

Web CMS™

Basic Editing (Part 1)

Contents

| | |
|--|----|
| Overview of Web CMS Templates | 1 |
| External, Internal and Closed Areas | 1 |
| Standard Page Template | |
| | 1 |
| The First Column | |
| | 2 |
| The Second Column | |
| | 3 |
| The Third Column | |
| | 3 |
| Home Page Templates | |
| | 4 |
| Introduction to the Active Edition CMS | 5 |
| Benefits of Using Active Edition Web Based CMS | 5 |
| Connecting to the CMS | |
| | 5 |
| Connecting From a PC | |
| | 5 |
| Connecting From a Mac | 5 |
| The CMS Login Screen | 6 |
| Preparing the PC for Use with the CMS | 7 |
| Setting Compatibility View | 7 |
| Allowing Pop-Up Windows | 7 |
| Create a Favourite to the CMS Web Page | 8 |
| Display Screen Resolution or Size of Screen | 8 |
| Drag & Drop Window in the CMS | 9 |
| Log into the CMS | |
| | 9 |
| The Area Manager | |
| | 10 |
| Opening Pages | |
| | 11 |
| Adding, Editing and Formatting Content on a Page | 11 |
| Adding an Image or Picture to the Page | 13 |

| | |
|--|----|
| Searching For and Adding Links to the Page | 16 |
| Internal Links | 16 |
| External Links | 17 |
| Changing the Linking Text | 18 |
| Creating a New External Link | 20 |
| Checking Links before Publishing | 20 |
| Adding a Promotional Item | 21 |
| Publishing the Page..... | 21 |
| Logging Off | 22 |

Overview of Web CMS Templates

External, Internal and Closed Areas

These three types of CMS areas are setup as follows:

- **External** areas are public-facing and provide information for our audiences outside the University of Reading
- **Internal** areas are mainly meant for current staff and students, but can still be viewed by external audiences. They can point to pages that have been setup in the CMS or, alternatively, they can be redirected to point to the Blackboard Login screen if the internal information is stored under Blackboard
- **Closed** areas are secure areas that can be setup for pages which are to be restricted to University staff and/or students. Such an area has to be specifically asked for before it is setup (via the blue IT Self Service Desk button on the IT home page at <http://www.reading.ac.uk/it>)

Standard Page Template

The **standard** and **standard-school page templates** are used for the majority of content pages. These templates are made up of **three** columns:

- The first column is used for navigation via a **menu** or the **See also** box for links to related web sites. It can also contain a box for **promotional items** (e.g. to publicise an Open Day)
- The second column is used for the **main body of your content**
- The third column is used for the **Things to do now** box. This should contain a set of links that are a **call to action** and encourage the reader to take a next step. This column should also contain relevant **contact details** and, optionally, **social media links**. If relevant, this column will also contain a link to any internal content for current staff and students.

An example of a CMS page using the standard template is shown below:

The screenshot shows a website page for the University of Reading. At the top left is the University of Reading logo. To its right is a navigation bar with links for 'Life | Study | Research | Business | About | News & events'. Further right is a search bar with 'A-Z lists | Search | University site' and a 'Go' button. The main content area is titled 'Modern Languages and European Studies' and 'About French Studies'. It contains several paragraphs of text describing the department's offerings, including undergraduate and postgraduate courses, research opportunities, and a 'Year Abroad' program. On the left side, there is a vertical navigation menu with items like 'UoR Home', 'Modern Languages Home', 'About us', 'Staff list', 'Job vacancies', 'Request a brochure', 'European Literature and Culture', 'European Studies', 'French Studies', 'German Studies', 'Italian Studies', 'Dr Maria Carla Battelli', 'Undergraduate visit days', 'Postgraduate taught', 'Postgraduate research', 'Research', 'Researching and Documenting Key Words in European Migration Discourses Project', 'News and events', 'Teachers and advisers', and 'e-France online journal for French Studies'. Below this menu is a 'See also' box with links to 'About the University', 'Open day information', and 'Life at Reading'. On the right side, there are three boxes: 'For current students and staff', 'Things to do now' (with links to undergraduate and postgraduate courses and research opportunities), 'Follow us' (with a Facebook link), and 'Contact us' (with email, telephone, and fax numbers). At the bottom of the page, there is a footer with links for 'Accessibility | Privacy policy | Cookies | Disclaimer | Site map | Contact us | Find us' and the copyright notice '© University of Reading'.

The First Column

The column on the left can contain up to three elements: the Navigation Menu, *See also* Box and the Promotional Box. The use of these is described further below. **The Navigation Menu**

The image shows a vertical navigation menu with ten items, each on a separate button. The items are: 'UoR Home', 'Typography Home', 'About us', 'Undergraduate', 'Postgraduate taught', 'Postgraduate research', 'Short courses', 'Research', 'Collections and archives', 'Design and print', and 'News'. Each item is preceded by a left-pointing arrow icon.

The menu is used as the main navigation tool for the website.

It should contain a **University Home** button (*UoR Home*) and a **Home** button that goes to the home page of that website, in this example to the Department of Typography.

The other menu buttons can be built up after the pages for the website have been developed.

The See also Box

You can use the **See also** box (which can be called to offer links to other websites that are related to the page. You should not normally use the *See also* box to link your own site. The *Things to do now* box should be used for

In this example, Typography has links to its parent school
Design and Print Studio.



something else) content on your to pages within these instead. and the

You can use the **promotional** box to publicise a news article, product or service within

The Promotional Box

your area. The title should be an eye-catching headline, with the box underneath used for a short explanatory message, maybe with a link to further information. An image can also be included as long as it is small enough to fit in the box. This box should be left empty in the CMS if nothing is currently being promoted.

Note: The headline (the top line of larger text) should be kept within 20 characters.

The short message below the headline can contain a link to further information about the promotional item and even a small-sized image.



The Second Column

About us

We teach the history of the Western world from early medieval times to the present, encouraging students to see modern times in their long-term context.

Our courses are divided into the following broad time periods and areas:

- The Middle Ages (500-1400)
- The Early Modern Period (1500-1750)
- The Early Modern Period (1776-the present)
- Europe from the British Isles to Russia
- United States of America

Innovative research underpins our teaching and lies at the heart of what we do.

We conduct path-breaking research in political, religious, social, and cultural history from medieval Europe to the modern world.

We have a lively community of postgraduate students, and all our students have the opportunity to learn from and interact with professional historians.

Our research themes (Minorities; Language, text & power) and research centres (Graduate Centre for Medieval Studies; Early Modern Research Centre, Centre for Economic History) allow historians at Reading to cooperate with colleagues in other disciplines to widen the boundaries of their understanding and view of the past.



The second column is used for the main body of your content. It can contain **text**, **links** and **pictures**.

Note that the default branding puts pictures on the right of the web page. This also helps your content to stand out as most people read from left to right, making sure your important messages do not get missed.

The Third Column

 [For current students and staff](#)

Things to do now

- ▶ [See our job vacancies](#)
- ▶ [Visit us](#)

Contact us

- ▶ **Email:** biosciences@reading.ac.uk
- ▶ **Teaching Office:**
0118 378 6163
- ▶ **Student Recruitment & Open Days:** 0118 378 5393
- ▶ **General Enquiries:**
0118 378 8072
- ▶ **Or look at our contact details for the right person**

Follow us

-  Facebook
-  Twitter

The third column is used for the **Things to do now** box (which can be called something else). This should contain a set of links that will encourage the viewer to take further steps having read this page. They should be calls to action such as ‘Order a prospectus’, ‘Apply now’, ‘See our job vacancies’. These links should usually be for pages within your own site. If you want to link to pages on other sites, these should be placed in the *See also* box.

After these links should come relevant contact details, if the viewer needs to make an enquiry. Further optional social media links can also be put in such as to Facebook and Twitter.

If relevant, this column will also contain a link at the top to any internal content for current staff and students.

Home Page Templates

The **home-page template** is used to provide a brief overview of a school or directorate site, to enable viewers to quickly and easily navigate to the information that they require.

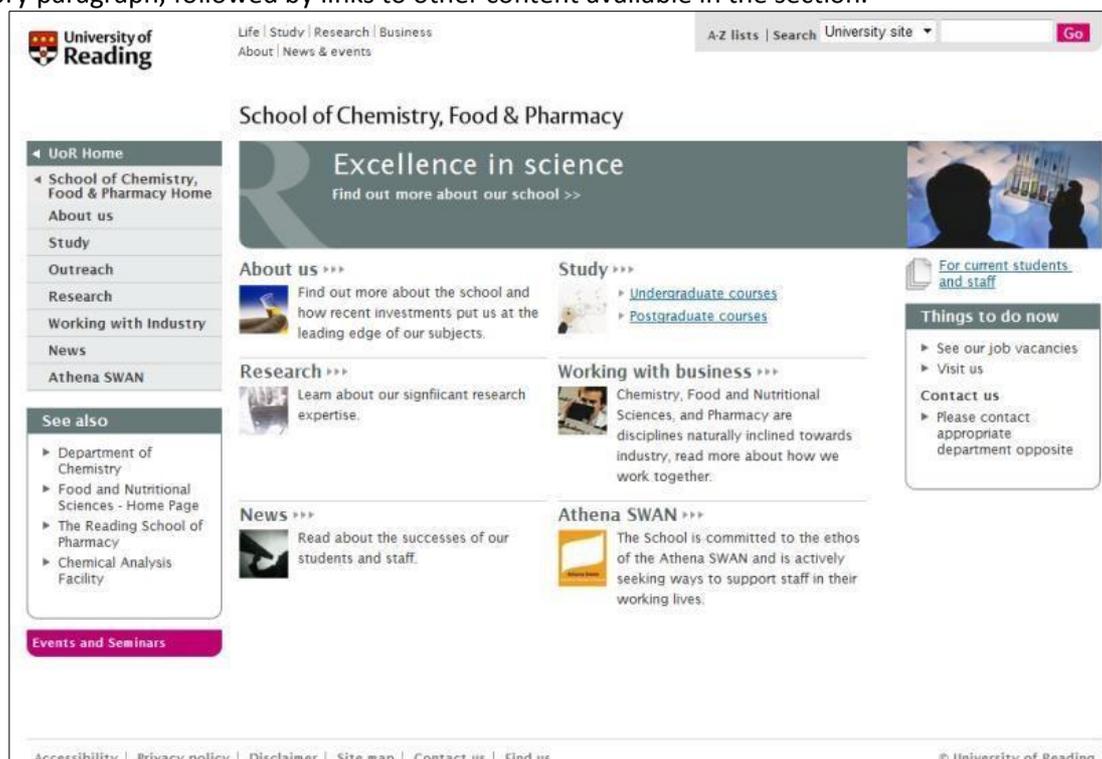
There is a maximum of 8 areas which should usually reflect the content and order of the **left navigation pane**, although it doesn’t have to strictly follow this. As an alternative, the home page can be focused on the top tasks a user comes to the website to complete – if you want to explore this option further, please contact *Digital Development*.

The promotional banner should be used to promote the overall ethos of your school/department/directorate/group, and illustrate its subject/ work. There are two distinct sections available: the first is for a headline and the second for a short, punchy message promoting the overall ethos and highlighting elements of its work. The banner should contain a link to further information about the item you are promoting.

Note: the headline should be kept within 30 characters and the short message below the headline should be kept within 88 characters.

The image for the banner (seen in the third column) should be 180 pixels wide x 100 pixels high.

Each section can contain a very small **thumbnail** image (45 pixels wide x 45 pixels high) alongside a very concise introductory paragraph, followed by links to other content available in the section.



The **reduced home-page template** is another template available to you. This page could be used as home pages for smaller websites (usually with 5 or less main areas).

Note that the **main page template** used for some of the University top pages (eg Study, Life) is very similar.

Introduction to the Active Edition CMS

A **Content Management System (CMS)** is an application designed to assist with the management, organisation and control of large amounts of documents, links and multimedia resources. The University of Reading selected **Active Edition**, which is a web based CMS.

Benefits of Using Active Edition Web Based CMS

- Web content can be managed using just a PC with a web browser – no need to install desktop software. Note that the preferred web browser is **Internet Explorer** (8 or 9) as this gives full functionality, but it can be used with other browsers such as Firefox, Google Chrome and Safari (on a Mac or PC) although certain parts of the CMS may not work
- Allows for easy editing and formatting of pages via the interface

- Multimedia, File and Link resources can be managed centrally at a corporate or local level, which will assist with consistency across our website and help prevent broken links
- Workflow can be implemented for each website to assist with the editorial process and the live publishing of pages
- Access to edit web pages can be managed at school or departmental level:
- **Sub Administrator** (sometimes called Local Administrator). Users with this role will have at least one area of the CMS where they can manage their website. They can allocate whole areas or sub-areas to particular Content Contributors or CMS groups to create or edit the content
- **Content Contributor** - users with this role will be able to create or edit anything in whole areas or sub-areas to which they have been given access
- **Administrator** - those with Administrator permissions (eg IT Services and Digital Development) can set the system settings, including templates, for other users

Connecting to the CMS

Connecting From a PC

1. Open up your web browser which, preferably, should be **Internet Explorer**
2. Go to the web address for the CMS <http://www.cms.rdg.ac.uk/ae>

Note that if you are coming in from home via the University of Reading **WebVPN**, when you go to the CMS web address, a prompt box will appear asking for your University *username* and *password*. Make sure that you put **rdg-home** in front of your username.

Connecting From a Mac

1. Open up your web browser – on a Mac it will usually be **Safari**
2. Go to <https://webvpn.reading.ac.uk/> which is the page to connect to the University of Reading WebVPN
3. Enter your University of Reading *username* and *password*, and click on the **[Sign In]** button
4. At the bottom of the next page, under **Terminal Sessions**, click on **Windows Terminal Server**

Some extra things to note:

- The link for the Windows Terminal Server will only appear if you connect from a nonWindows machine. This has been tested in Safari and Firefox on MacOS, and Firefox on Linux
- The link for Windows Terminal Server requires Java 1.5 or above
- If the error, **missing plugin**, appears, it is likely that you are running the latest version of the mac OS where Java has been removed for security reasons. You will need to install java from <http://support.apple.com/kb/HT5648>

This will connect you to the Terminal Server and you will be prompted to log in:

5. Enter your University of Reading *username* and *password* at the Terminal Server prompt

After a short while, you should find that Internet Explorer has been started up automatically for you.

6. Open the Internet Explorer favourite **Activedition Web Content Management System** or go to the web address for the CMS at <http://www.cms.rdg.ac.uk/ae>

The CMS Login Screen

The CMS Login page should look similar to that below:



You won't be able to **Auto Log In** for the first time until you have looked at the licence agreement:

1. Click on **Licence Agreement** to do this – it is opened up in a new window
2. Close the *Licence Agreement* window then tick the box next to **I have read and accept the terms and conditions of the Licence Agreement** - the [**Auto Log In**] (and [**Log In**]) buttons become darker indicating that they can be used

Note: On subsequent logins, the line about reading the terms and conditions will not appear.

If it's the **first** time that you've used this CMS on **your own/office PC** then it's worth clicking on the **Browser Setup** button. There are two browser controls (**activeX** controls) that need to be installed.

Note: you will need to be logged on to the PC as an Administrator to be able to install these controls. Usually, if it's your office PC, your username would have been setup as an Administrator.

If installed correctly, you will see the following controls listed in a window:

- **Configurable Workflow Control:** should be showing at least Draft and Awaiting Publishing boxes
- **Multiple File Upload Tool:** you can use this to choose the files you want to upload

Occasionally the installation of these controls does not complete successfully first time. Click on the **Browser Configuration Instructions** link near to the top of the window to get further help.

If you find that a prompt box always appears asking for your University *username* and *password* every time you go to the CMS login page, even if you're working on campus, then the following may help to resolve this:

1. Assuming you're using **Internet Explorer 9**, click on the [**Tools**] button  and select **Internet Options**
2. Click on the **Security** tab at the top and then select the **Local intranet** zone by clicking on it
3. Click on the [**Sites**] button followed by the [**Advanced**] button
4. Click in the box under *Add this website to the zone:* and type in the CMS web address of **http://www.cms.rdg.ac.uk/ae** followed by clicking on [**Add**]
5. Click on [**Close**] and then click on [**OK**] 2 times

Preparing the PC for Use with the CMS

Setting Compatibility View

From around the end of 2014, certain settings on the IT network were changed that meant that the following extra set of steps were needed before logging into the CMS to allow pages to be edited (without out these steps, you will find that the **[Check Out Page]** button, showing the yellow padlock, will not bring up the dashed boxes allowing editing on the page).

On your **own PC**, you should only need to carry out these steps **once**:

1. Make sure you are on the CMS Login page in your web browser (usually Internet Explorer)
2. In **Internet Explorer (9, 10 or 11)**, click on the **[Tools]** button  in the top right-hand corner and choose **Compatibility View settings**
3. It should show **rdg.ac.uk** under *Add this website:* – click on **[Add]** and then **[Close]** the *Compatibility View Settings* window

Allowing Pop-Up Windows

When you use the CMS, you will often find that when you go to a different part of the system, a new window will be opened. You need to make sure that your web browser **does not block** these CMS windows (your browser will probably treat them as **pop-up** windows) otherwise you may not be able to open any web pages that you have access to in the CMS.

To check the status of the pop-up blocker and turn it off if necessary, in **Internet Explorer 9**:

1. Click on the **Tools** button  and select **Internet Options**
2. Click on the **Privacy** tab and if there is a tick in the check box next to **Turn on Pop-up Blocker** then clear it by clicking on the box – press **<Enter>** for **[OK]**

In **Internet Explorer 8**:

1. Open the **Tools** menu and select **Pop-up Blocker**
2. If the option **Turn Off Pop-up Blocker** is shown then click on this to choose it (otherwise click away from the menu so you don't turn it on)

The above is the quickest option but, on your own PC, you may want to still block advertising popups from the main websites, but allow pop-ups from the CMS (and other local sites). Carry out the same steps as above and then do the following:

3. Go into the Pop-up Blocker **Settings**
4. Type in the web address of the website that you want to allow and click on **[Add]** - the required web address should now be showing in the list of *Allowed sites*
5. Press **<Enter>** to **[Close]** the Pop-up Blocker Settings window

Note: if your web browser has a Google or Yahoo toolbar showing then your pop-up windows may still be blocked. The easiest way to deal with this is to **close** the toolbar.

In **IE9**:

1. *Right click* an open space to the right of or above the **[New tab]** button – the small square button after all the other open tabs
2. Select **Command bar**
3. Click on the **Tools** menu and choose **Toolbars**

4. Click on the name of the toolbar you want to hide, e.g. Google (it will have a tick next to it) - this toolbar should disappear

In **IE8**, just carry out steps 3 and 4 from above.

For the Pop-up blocker settings to take effect, you may need to close your current Internet Explorer window and open up a new browser window.

Create a Favourite to the CMS Web Page

For ease of future access, it is recommended to create a favourite to the CMS login page in your web browser. The steps are as follows:

1. Go to the CMS web page, click on the **[Favorites]** button (in **IE9**, this shows as ) followed by **Add to Favorites**
2. Decide whether you want to put the favourite into a new or existing folder, then click on **[Add]**
3. Click on the **[Favorites]** button again, **right** click the favourite you've just added and choose **Properties** from the shortcut menu
4. Edit the **URL:** entry so that it ends with **ae** (ie <http://www.cms.rdg.ac.uk/ae>) instead of the *activedition/aelogin.asp* address it has been redirected to – press **<Enter>** for **[OK]**

Display Screen Resolution or Size of Screen

The recommended display screen resolution or size is at least **1024x768**, otherwise you may have problems such as icons on the toolbars in the CMS being cut off. To check or change this:

1. **Right** click on your PC's desktop and choose **Properties** from the shortcut menu
2. Click on the **Settings** tab - from there you can check and change, if necessary, the screen resolution
3. Click **[OK]**

Another possible solution to the problem of the icons on the toolbars in the CMS being cut off is to **decrease the zoom level** inside your web browser. To do this in Internet Explorer:

- Change the zoom level using the dropdown list arrow next to the current zoom level in the bottom right-hand corner of the Internet Explorer window

Tip: Press **<Ctrl ->** to decrease the zoom level by 25% (**<Ctrl +>** increases it)

Drag & Drop Window in the CMS

Up until recently, when using Drag & Drop in the CMS, the recommendation was to **wait between 15-30 seconds** for the window to flash to show that it has moved to the next step. A new method has now been found, detailed below, which allows a **status bar** to be seen at the bottom of this window to indicate when the CMS is thinking! Note that this **only** works in **IE8** (in **IE9**, the progress bar within the status bar has been removed). This should only have to be setup once:

1. Open the **Tools** menu or button and select **Internet Options** at the bottom
2. In the *Internet Tools* window, click on the **Security** tab at the top followed by the **Custom Level...** button
3. In the Security Settings window, just over halfway down in the **Miscellaneous** section, look for and **Disable** the option called **Allow websites to open windows without address or status bars**
4. Click **[OK]** 2 times to accept and exit from the Security Settings and Internet Options

Note that even after doing this, the drag & drop window has to be **enlarged** every time in order to see the status bar!

Log into the CMS

Although there are 2 ways of logging into the CMS, the **recommended** option is to use your Windows login details through the **[Auto Log in]** button. **Please remember to always use the [Auto Log In] button** (if there is no **[Auto Log in]** button or it doesn't work then contact IT).

On the training course and when using your office PC, you should have logged into the PC with your own University username and password. As such, you would have been identified from these details.

1. Click on the **[Auto Log In]** button

Something similar to the following screen, **Main Explorer**, should appear within your web browser window:



From here you can access certain content editing and management features such as **Site Management** and **Libraries**. What you can access is dependent on your **role** within the CMS. For those on the training course, and for most users, they will be setup to the role of **Content Contributor** - this can be seen in the bottom left-hand corner of the Main Explorer screen next to the username that you used to log into the CMS (if you are a sub/local administrator on the live site, you will see **Sub Administrator**).

In the top right of the Main Explorer screen is a drop-down list to go to different open CMS windows, and the icons to the right represent respectively, **Find page** (this can be quicker than going to Area Manager to look for a specific page), **Refresh** (to refresh the screen), and **Log out** (be careful **not** to confuse this icon with the padlock icon seen later to check out a page for editing).

Note that there is an **automatic logout** feature within the CMS that has been set (currently to 1 hour) to automatically log you out after a certain time (you are warned a few minutes before this happens). As such, it is recommended that you **save** any page you are working on *before* you go out for a break or away from the office.

The Area Manager

As the CMS uses a web interface, you need to be patient as it may take a few seconds to download content. To look at the site areas or folders/directories that you have access to on the CMS:

1. Click on the **Area Manager** icon  in the **Site Management** group

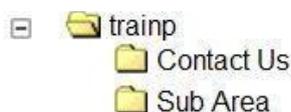
An *Area Manager* window eventually opens, displaying the site structure as folders in a tree view in the left hand pane:



You will be limited as to how much you can access of the site area structure on the CMS. For example, in the training session you will see a **train** area or folder under the *Area Manager*. Once you have been given access to your school/department/directorate web site, you will see a folder (or folders) for this site. Please ignore the *Staff portal*, *RDG* and *About us* areas.

The '+' inside the folder (sometimes it appears in front of it) indicates that there are further SubAreas underneath. To see these Sub-Area(s):

2. Click on the **name** of the folder you want to view (on the CMS training course this will be your **train** folder) and wait for it to open



The Sub-Areas under the **train** folders have been setup to represent an imaginary Directorate. In the training session, you will work on a page in the **Sub Area** folder.

Note that the naming of areas within the *Area Manager* has to follow certain rules. The name within brackets at the start of a main area is used to indicate that pages within that area must have that **prefix**. On the CMS, your School, Department or Directorate will have a particular prefix, e.g. IT Services used 'its-', and this should be at the start of the page name of any new page that you create in that area.

Opening Pages

To see what pages might already exist under your Sub-Area:

1. In the **Area Manager**, click the name of the folder you are going to work on (this should be **Sub Area** on the CMS Training course)

To the right of the *Area Manager*, the **Page Manager** should appear, showing you the pages that you currently have:



Before the page name (notice that it should start with the school/department/directorate prefix), you will notice certain symbols such as a **padlock** (or tick), and a **D** (or an **A** or a **P**) in a green square.

The *padlock* is to do with **page locking** – a CMS page can only be opened by **one** person at a time. A dark padlock indicates that it is currently available to anyone to open who has access to it; a red tick indicates that you already have it open; and a light padlock indicates that another person has this page open.

The second symbol in the green square is to do with publishing. **D** indicates **Draft**, **A** tells you that it's been submitted for **Approval**, and **P** means it's **Published**.

One of the most important rules is that each page name has to be **unique** within the CMS. This is why each School/Department/Directorate has to use a certain prefix at the start of each page name. It is also recommended to separate words in a page name with a '-' (hyphen) symbol as spaces are **not** allowed.

To open a page:

2. Click on the name of the page you want to open - it should open in a new **Page Explorer** window

If you cannot open the page, it is probably due to a pop-up blocker (IE, Google or Yahoo) that hasn't been turned off. If you get the message, **Log In Incorrect user name or password. Please try again**, clicking on **[Refresh]**  will usually clear the message and open the page.

Adding, Editing and Formatting Content on a Page

Although a page has appeared, you may *not* be able to edit it immediately if it has been *checked out* (indicated by a **padlock** symbol). If this is the case:

1. Click on the **[Check Out Page]** button  - the second button from the end of the upper toolbar

The page will be redrawn and should look similar to the one below:



This page has been setup with the *standard -school template* that is usually used for general content pages.

The **blue** dashed lines indicate *text sections*. On a standard page there are **8** text sections (you **cannot** have more). To add some content to the first text section in the second middle column:

2. Click in the *first* box in the *second* column beneath the page heading - the colour of the dashed lines change from blue to **red** indicating that this is the active text section
3. Type in the first paragraph of your content (for the training class, this can be something related to your department, work or research) - press **<Enter>** for a new line and to add space between the lines
4. Embolden some of the words you have written to emphasize them - select the words first then use **<Ctrl b>** or the **[Bold]** button on the toolbar

Note: the use of italic, underline or strikethrough is *not* recommended.

Note also that all text is left justified; the justify centre, right and full buttons have no effect. It is possible to use the **Increase** or **Decrease Indent** buttons (after the list buttons on the top toolbar) to move selected text either further right along the line or back left.

5. Move to the line below the paragraph and put in a heading or title:
 - a. Type in a heading (eg *My Interests*) then select the words (either drag through it or click *three* times on it, using the mouse)

- b. Click on the drop down list arrow next to **[Normal]** on the left of the lower toolbar and choose **Heading 3** from the list - your heading should appear (with a grey line above it) in a bigger size and in the same colour as the page heading (the colour is chosen when a new website is setup)
 - c. Press **<End>** to move after your heading then **<Enter>** for a new line
6. To put in a list (if the order is important, use a *numbered* list; otherwise use *bullets*):
 - a. Type in your first list item and press **<Enter>**
 - b. Continue with a few more list items then select the list by dragging through the text
 - c. Click on the **[Insert Unordered List]** button (with the bullets on it) on the upper toolbar

As well as adding new content, you can also **copy and paste existing content** from elsewhere. This content could come for example from an existing live web page, a PowerPoint presentation, a Word document or a PDF. To copy and paste the content:

7. Open the original content, select the text, and **copy** it (using the **[Copy]** button, or *right click* and **Copy**, or press **<Ctrl c>** on the keyboard)
8. On your CMS page, position yourself in the right place and click on the **[Paste]** button (or use **<Ctrl v>**).

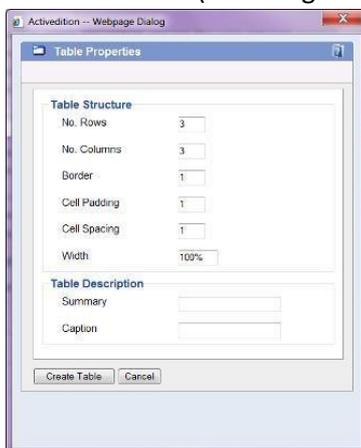
You may get prompted to *allow access* to which you should click **[OK]**. You may also get prompted about the content being pasted if it is from Word or includes web links in it - once again click **[OK]**.

There is also a **[Paste Plain Text]** button next to the **[Paste]** button on the upper toolbar. This will just bring in the text, losing any original formatting, links or line breaks/carriage returns. Only use it if you don't want the original formatting.

Note: The *spell checker* within the CMS isn't easy to find. If you do want to check your spelling then it's easiest to type your text into Microsoft Word and spell check it there, then copy and paste it back to your web page.

You can also create **tables** on your CMS page:

1. Click on the **Insert Table** button on the lower toolbar (to the right of the heading style drop down list)



2. In the *Table Properties* dialog box, setup the number of rows and columns that you want
3. You *must* also supply a **Summary** (the **Caption** is optional and will appear above the table)
4. Press **<Enter>** for **[Create Table]**

You can now put information into your table such as text, links and images. As you type, you'll find that the table columns will change in size. Don't be alarmed – when you type in the next column, the table columns will resize themselves. To insert and delete rows or columns from the table, it is advised to *right click* in the table and then choose the appropriate option from the menu.

5. Click on the **[Save]** button on the far left of the top toolbar (or press **<Ctrl s>**) to save your page

Note: if, after saving, the new changes have *not* appeared, click on the **[Refresh]** button or press the **<F5>** key on keyboard - the new changes should now appear. For any further issues or problems with saving a page, it's best

to contact IT, via the blue IT Self Service Desk button on their home page, to report the problem that you're having.

Tip: If you want to insert accented European or Greek characters into the page, use the **[Insert Special Character]** button  towards the end of the 2nd toolbar. There are General, Greek, Latin and Miscellaneous subsets. If there's a character that isn't in any subset then you need to find out the custom HTML code for that character which can then be inserted.

Adding an Image or Picture to the Page

Next, try and add an image or picture to your web page. Note that images have to first be uploaded to a CMS multimedia library. Before adding any new image, you need to consider a number of things:

- **Purpose of the image** - it should be to illustrate a point you are making within your text, e.g. an image of a field trip, student graduation or other up-to-date activity
- **Size of the image** - any size is permitted, but we recommend a minimum width of 100 pixels, and a maximum width of 350 pixels to fit within the middle column. For more information on sizes and how to work with your own images, look at the checklist for images and promotional elements at <http://www.reading.ac.uk/web/files/its/brand-images2.pdf>
- **File size** - this should be as small as possible at the required dimensions, but ideally less than 20K per image. The preferred file type is **jpeg**
- **Copyright of the image** - there are a number of important points to consider:
- All images for the University website must be taken from authentic sources and must either be licensed for web use or used with permission from the copyright holder. It is recommended that you check the **University ImageBank** (<http://www.reading.ac.uk/imagebank> - you need to register first) for images first, as all the images here are either owned by the University or have been cleared for use on the University website. Otherwise, it is your responsibility to obtain the appropriate licence for images and to adhere to its terms – image rights holders are very protective of their content and can easily discover unlicensed or copied images
- **DO NOT** just copy and paste images from anywhere on the Web or search engines such as Google Images – if you really want to use an image on your web page, write to the copyright holder for permission and upon receiving permission, make a note on the page on which your image is on to say 'Image reproduced with permission'. If you do not receive a response, you may not use the image and should seek an alternative one
- Photographs taken by a member of staff outside of their normal course of employment are copyright of that member of staff. Their written permission (in the form of an email) is required before using their photographs on the website
- A **consent form** must be signed by individuals who are the subject of a photograph if the photograph is for use on the University website. This includes members of staff whose photographs are intended for staff lists and personal pages. Photographs of groups of people do not require written consent from each individual in the group, but when taking the photograph they should be made aware that it will be made available on the University website
- Consent forms can be downloaded from the **IMPS** (Information Management & Policy Services) website (<http://www.reading.ac.uk/internal/imps/Copyright/imps-copyright.aspx>) and when completed must be returned to IMPS. Retrospective consent is not necessary if the individuals were aware and had no objections at the time of the photograph that it would be used on the website

- If you require further information or need more guidance on images and copyright, please contact copyright@reading.ac.uk

As well as copyright, two other **very important** areas that IMPS cover are:

- Freedom Of Information (FOI) Act
- Data Protection Act 2018
- General Data Protection Regulation 2016

The IMPS website at <http://www.reading.ac.uk/imps/> has further information about both of these acts and *before* working on live pages on the CMS, you have to have taken and *passed* both the **FOI and DP online modules** that can be accessed from the [Information Compliance Training](#) page on the IMPS website.

The image to be added is from an existing **Multimedia Libraries**, using a *Drag and Drop* technique.

1. Click under the last text that you created
2. Click on the **[Drag & Drop]** button  on the right of the upper toolbar - you will use it a lot

A *Drag and Drop* window, similar to the following, will appear:



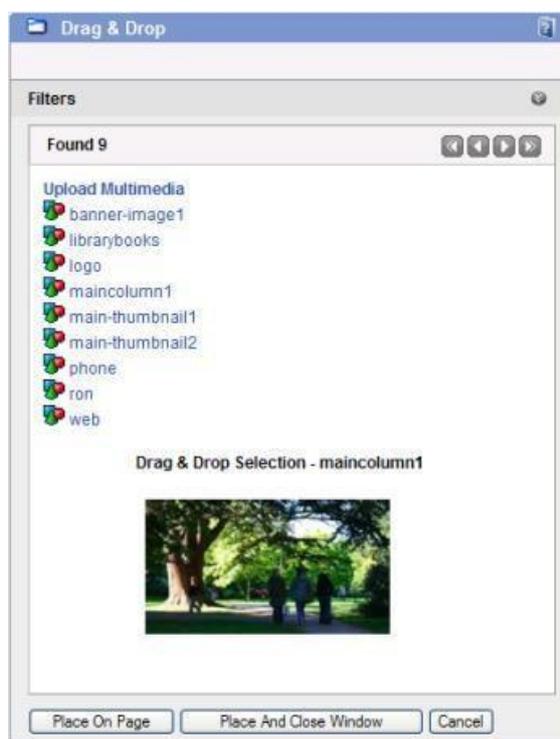
The **Multimedia** *radio button* should already be selected.

3. Click on the drop down list arrow next to **Library** currently showing **Please Select**, and choose the appropriate library (on the training course choose **training**)

Note: When using *Drag & Drop*, wait for the window to flash to show that it has moved to the next step

4. From the list of multimedia filenames, click on the name of the image you want (on the training course, choose **maincolumn1**)

The *Drag & Drop* window will change to show a preview of the image:



You can now either drag and drop it or place it at the current typing position:

5. Click on the image in the *Drag & Drop* window and keep the left mouse button pressed
6. Move the image over to where you want it on your web page (the cursor shows as a box with an arrow)
7. Release the mouse button - by default, the image is usually put on the right-hand side

Note: if you use the **[Place On Page]** or **[Place And Close Window]** buttons and an error message appears, you will have to use drag and drop instead.

Tip: If you are going to put in a number of images and links, keep the *Drag & Drop* window open. As you are going to put in some links next, leave it open.

8. Save the changes to the web page by clicking **[Save]** (or press **<Ctrl s>**)

Searching For and Adding Links to the Page

Internal Links

Next, you are going to add an **internal web page** link (to a page already within the CMS). The internal link is going to be placed in the **Things to do now** box on the right.

Currently, the **Things to do now** heading should be showing in the third column (white text on a colour background). This heading can be changed, as long as it is to be used for a similar purpose, by clicking on the green **AE** icon  just above it.

Note: *Before* you click on one of these green icons, the latest changes to your web page should be saved otherwise you might lose them. If the floppy disk icon on the top toolbar is greyed out then this indicates that the latest version of your web page has been saved.

To make changes to this heading:

1. Click on the green **[AE]** icon  above the **Things to do now** heading The following **Meta Details** window should appear:



2. Replace **Things to do now** with the text that you want then press <Enter> for **[Save]** If the following prompt appears:



It is **very important** that you click **[Cancel]** to stay on the current page and then **save** the page before continuing otherwise you will lose any changes you have made previously. You can then repeat the first 2 steps above.

Your new heading should now be showing in the third column on the right.

Note: if you aren't going to put any links into either the *Things to do now* or *See also* boxes then it is best to have them *not* showing on the live site. This can be done by making the above heading completely blank, ie delete the heading text **Things to do now** or **See also**.

3. Click in the *first* box under the (possibly modified) **Things to do now** heading

You are now ready to enter an **internal** link. As you've done before for multimedia images, the **drag and drop** technique can be used to bring in links to the page.

4. Go to the *Drag & Drop* window if it's still available (via the browser icon on the Windows *Task Bar*) or click on the **[Drag & Drop]** icon (to relaunch it)
5. Click on the **Links** radio button (and remember to be patient!)
6. The *Drag & Drop* window will eventually change to the following:



It is recommended that you use the **Search:** box to help target the right page. It helps if you know the *page name* of the CMS web page you want to link to. The easiest way to find this out is to go to the live version of this page in a new browser window - the page name will usually be shown as the last part of the web address (URL). For the CMS training course, use the *Contact* page in your *Contact Us* subarea, with a page name similar to **trp-contact-page**.

If you have no idea of the page name you want to link to, use the **Site Areas** drop down list arrow to *Select an Area*. However, be aware that the list contains *all* of the closed, internal and external (publicfacing) areas and subareas of the Schools, Departments, Directorates and Research Groups in the University that use the CMS.

7. Click in the **Search:** box and type in the **page name** you want to link to (here, **trp-contactpage**)

Remember to include the school/department **prefix** at the start and *don't* add .aspx at the end.

8. Click on **[Go/Refresh]**
9. If the page name is correct, usually only one internal page link will be listed - click on this and wait for the *linking text* to appear

Once a link is chosen, you will see the exact words or phrase that will be used for the *linking text* shown underneath **Drag And Drop Selection** (on the training course this will be **Contact us**).

10. Click on the linking text and drag it over to where you want it on the web page (in this case inside the first box under the **Things to do now** heading)
11. With the linked text still selected, click on the **[Bullets]** button on the toolbar to put a bullet/arrow before it (the symbol used will have been set by the stylesheet that the CMS is using)
12. **[Save]** the latest version of the web page by clicking – or press **<Ctrl s>**

External Links

Now add an *external* link. This will be placed in the box under *See also* to the left of the central content column. Remember that the name can be changed as long as it is to be used for a similar purpose.

1. Click in the *See also* section/box
2. Go back to the open **Drag & Drop** window (or click on the **[Drag & Drop]** button if it is not open)
3. Next, click on the **Links radio button** and wait for the screen to be redrawn
4. Using the drop down list arrow next to **Link Types:** choose **External Web Pages**

There are a lot of external links, so again it is recommended that you use the **Search:** box to help target the right external link.

5. Click in the **Search:** text box and type in your search term (on the CMS training course, look for **bbc**)
6. Press **<Enter>** for **[Go/Refresh]**

Note: You can use the number drop down list to choose a particular link (though it's unlikely you would know the actual number). There are 10 links to a page and they are in alphabetical order. The *single arrow* buttons to go to the previous/next page and the *double arrow* buttons move to the first/last page.

The following steps assume that an existing external link was found; how to create a new external link is dealt with in a later section of these notes.

7. Click on the required link in the list (on the CMS training course, choose one of the **BBC** links) then wait for the **Drag & Drop** window to refresh - the *linking text* appears underneath **Drag And Drop Selection**
8. Click on the **[Place On Page]** button to put this link onto the web page (if this fails, use drag and drop)

The link should now show on the page (on the CMS training course, it should be under the *See also* heading)

9. Drag through the new link to select it then click on the **[Bullet]** button to put a bullet/arrow before it
10. Press **<Ctrl s>** or click on **[Save]** to save the latest version of the web page

Note that when linking to websites which are outside of the CMS (external links), exercise caution and only link to reputable sources. For more information on the University of Reading's legal position on linking, please see the *Disclaimer* link at the bottom of any official University web page.

Changing the Linking Text

With any link, whether it be internal, external or another option (e.g. email address, uploaded file), the linking text can be changed. This may be required if the original text isn't appropriate.

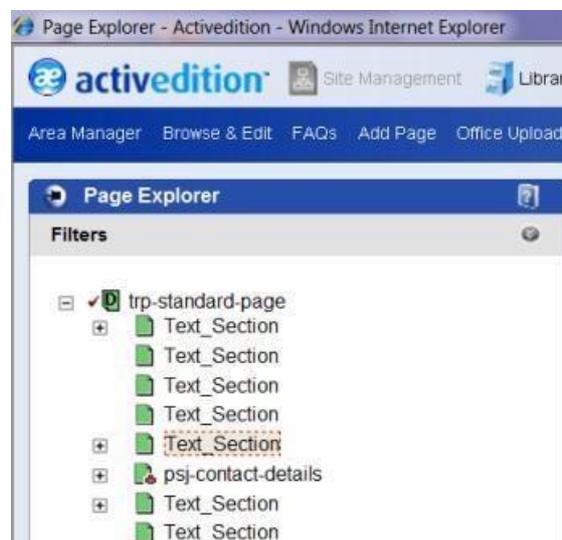
1. Click in the section with the link you wish to change – so the dashed border goes red (on the CMS training course, choose the first box under *Things to do now*)

It is possible to edit the text in a link directly, but be aware of the following:

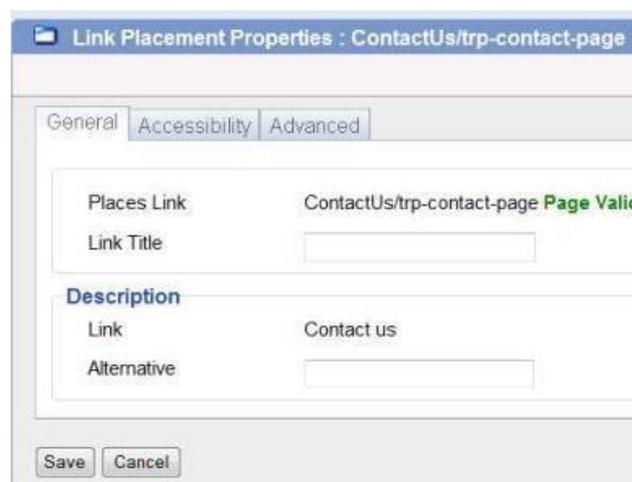
- Do *not* use the **<Backspace>** key to edit from the end of the link otherwise you can delete the link
- **Save** the page after editing the link
- If after saving, you find that the linking text changes to something else, it probably means that an **alternative** linking text has already been setup and you will need to follow the steps given below

The following steps are recommended for editing the linking text:

2. Now click on the vertical blue **Page Explorer** bar on the left of the page – this expands as below:



3. To keep this expanded bar showing, click on the *pin* in the top left corner (it now appears vertical)
4. Click on the '+' next to the selected *Text Section* (the one with the red border) then on the link itself (shown by an icon of planet earth) – a *Link Placement Properties* dialog box appears:



5. Click into the box next to **Alternative** and type in the alternative linking text

Note that if you put some text into the *Link Title* box, when a mouse is placed over this link on a web page, the text will appear in a box on the screen next to the link. If you want the link to open up in a *new web browser window*, move to the **Advanced** tab, and under **Target** and **Alternative**, select **New** from the dropdown list.

6. Click on **[Save]** to save the new *Link Placement* properties and close the *Content Editor*

The page is regenerated to show the alternative linking text.

7. Finally, press **<Ctrl s>** to **[Save]** the latest version of the web page
8. Click on the pin again and move the mouse over the main text to collapse the Page Explorer bar

Note: Using the above method, if you want the same link more than once on the same page, but you want the linking text to be different in both cases, the links *must* be in different sections/boxes on the page.

Creating a New External Link

If you don't find the required external link when you searched for one, create a new one as follows:

1. Place the typing position on a new line on the page where you want the new external link to go
2. Click on the **[Drag & Drop]** button (or go to the *Drag and Drop* window if it's still open)
3. Click on the **Links** radio button - remember to be patient!
4. Change **Link Types:** to **External Web Pages** using the drop-down list (and wait for them to appear)
5. At the top of the links list, click on **Create A Link**. An **Add New Link to External Web Page** box appears:
 6. Enter a **Name** for your external link (on the CMS training session, start it with **cmstrain-** followed by what you want to use)

This is the name that appears in the list of external links that everybody sees, so try to give a sensible and memorable name. Note that the name *cannot* contain spaces (use hyphens to split words)

7. Enter a **Description** - this is used as the default linking text so, once again, write something sensible
8. It's a good idea to click on the **[ABC]** button to spell check your text
9. Next to URL, type in (or copy and paste from a web browser window) the web address for your external link - note that web addresses do *not* need the **http://** at the start
10. The **Advanced** tab allows you to set the link to open in a **new window** if you want this
11. Click **[Save]** to create the new link

This external link should have been added to the *Link Library* and made available for anyone to use.

12. *Drag and Drop* the new external link onto the page - the link text should be showing under **Drag And Drop Selection**
13. Close the *Drag & Drop* window
14. Press **<Ctrl s>** to **[Save]** the latest version of your web page

Checking Links before Publishing

To check that your internal and external links are working:

1. Move your mouse pointer over the blue vertical **Page Explorer** bar on the left of the page
2. *Right click* on the **page name** at the top of the list, select **Page Locking** and then **Check In Page**

The page should now be in viewing mode (as when you first opened it). To check any link:

3. *Right click* on the link and choose **Open in New Window** (this is recommended, especially for



PDFs, as it isn't always possible to return to the original page)

4. Having checked the link works, close the new window
5. Finally, click on the padlock icon to **Check Out Page** and return to normal editing mode

Adding a Promotional Item

Underneath the *See also* area on the left, there is an optional coloured area (the colour is set by your website branding colours) where an item, for example a course or open day, can be promoted. If you leave this blank then the promotion box is not shown on the live page. Before adding any promotion, make sure that you save the page. To add a promotional heading, followed by some further text and a link to another page in the box below the heading:

1. Click on the green AE icon  in the coloured promotional area below *See also* – a new window appears
2. Type a promotional heading (this should *not* be more than **20** characters) then click on **[Save]**
3. Click in the section/box below your promotional heading and type in the text to describe the item

Note: This can include a link to a page/website with further information. The text appears in black, but if you press **<Enter>**, it turns white. Note that it is also possible to put a small image/logo in the promotion box.

4. Press **<Ctrl s>** to **[Save]** the latest version of the web page

Publishing the Page

Now that your test web page has been saved with some examples of text, images and links, it's ready to be published.

1. Open the blue vertical **Page Explorer** bar by moving the mouse over it then **pin** it, as before
2. *Right click* on the page name at the top and choose **Publishing** followed by **Submit for Approval** at the top

Note: The lower **Submit For Approval With Comments** option allows you to add extra comments, but is not usually used.

The following submit this page for publishing prompt appears:



3. Press <Enter> for [OK]

The *Page Explorer* window is now closed and you're taken back to the Area Manager. Note that your web page name now has an **A** before it. The **A** indicates that the page is in an *awaiting publishing* mode and has been submitted for approval.

Most users will go onto publish immediately, but some departments/schools may have decided to setup a **Notification List** which usually means that the page has to be checked by someone else for errors before it can be published (this could be the original editor or someone different if the original editor is restricted from publishing).

Notification Lists can be set up so that whenever a page changes status (e.g. Draft to Submit for Approval, or Submit for Approval to Publish), users are informed either by email, or in the Task Manager or both. A possible disadvantage with this is that many emails can be generated to lots of people if they are on the list. Further information on setting up a notification list is in the [CMS Sub Administrator document](#).

In this case, let's assume that the page is ready for publishing:

4. Right click on the page name and from the menu choose **Publishing** followed by **Publish** 5. A *Publish Notification* should appear as follows:



6. Press <Enter> for [Continue]

In the **Page Manager** section, on the right of the **Area Manager** window, your web page name should now have a status of **P** indicating that it has been published on the live web site.

Logging Off

Once you have done what you need to do on the CMS for the day, the best way of finishing off is the following:

1. Make sure you have saved and/or published the last page that you were working on
2. Click on the drop-down list arrow next to  in the top right of your CMS window and choose **Close all windows**
3. Logout from the CMS by clicking on the **[Log out]**  icon in the top right of your CMS window

Note that any open Drag and Drop window will still have to be closed even after the above steps.

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