IT Training

University of Reading

Web CMS 2
Advanced Editing, New Pages and Menus

Contents

Upload a New Image

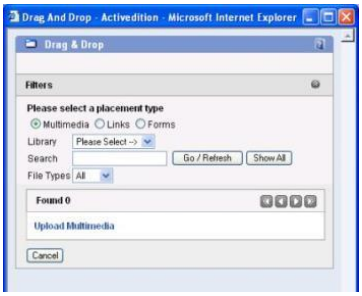
You are going to upload a new image to a CMS **multimedia** library that you have access to. Before adding a new image, you need to be aware of a few things:

- **Copyright of the image** - these are reminders taken from the Web CMS 1 course:
  - 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 are either owned by the University or have been cleared for use on the University website.
  - Consent forms, for people appearing in photographs, can be downloaded from the **IMPS** (Information Management & Policy Services) website and when completed must be returned to IMPS. (http://www.reading.ac.uk/internal/imps/Copyright/imps-copyright.aspx).
  - If you require further information or need more guidance on images and copyright, please contact copyright@reading.ac.uk
- **File size** - this should be as small as possible at the required dimensions, but ideally less than **20kb** per image. **JPEG** is the preferred filetype
- **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 on a standard CMS web page. 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
- **Editing an image** - if you need to change something about an image (e.g. size, filetype), you will need access to image editing software such as **Microsoft Office Picture Manager** (which comes with Microsoft Office under Microsoft Office Tools) or Adobe Photoshop. Further help on editing and creating digital images can be found at http://www.reading.ac.uk/internal/using-images/
- An **image editor** within the **CMS** which can be used to change the size of an existing image in a Multimedia Library – see http://www.reading.ac.uk/web/files/WWW_File_Library/v4.1.6-contributer.pdf, pages 96-100 of the Activedition v4.1.6 contributor manual, for more help on this
- **Number of images on a page** – up to 6 small images is probably ok, but users accessing a page with more than a couple of large images will quickly find that the total size of their page reaches 1mb or more, which would affect performance, even on broadband. It would also prove frustratingly slow (and potentially costly) for anyone on a phone using their mobile operator's data network

Assuming that you have already Auto logged into the CMS, opened up the *Area Manager* window, and accessed the appropriate area/subarea, the **Page Manager** should be on the right-hand side with a list of your pages in that area.

1. Click on the web page that you want to work on
2. Position yourself on the page where you want the new image to go. You may need to press **<Enter>** to put yourself onto a new line

3. Click on the **Drag & Drop button** towards the end of the top toolbar. A *Drag and Drop window*, similar to the following, will appear:



4. Choose the **library** that you want to upload the item to (on the training course choose **training**) - remember to be patient!
5. Click the **Upload Multimedia** link

The following *Multimedia Upload* window should be displayed (any prompts with a **red star** next to them are **required** to be filled in):

6. Click on **[Browse...]** and choose an image file to upload from your computer. Note the following points:
   - To just see images, change the **File type** to **Pictures**
   - On the training course or from ITS PCs, upload one of the image files from either the **cms_training_files** or **bb_training_files** folders under the **training** folder on the **D:** drive
   - If you upload one of your own image files from the network drive **N:** make sure you follow the **best practice guidelines** (given above), especially regarding the size and width of your image so that it fits into the middle column of the web page
   - The filename should **not contain spaces** nor the **'.'** (**dot, full stop**) symbol (also keep clear of other strange characters – it's safest to stick to **letters** and **numbers**)
7. Type in a relevant **description** for your image (e.g. in the case of ron.gif you might type 'Picture of Ron'). This will be used as the **default alternative text** (for people with visual impairment) for the image
8. Click **[Upload file]**
9. Assuming your image uploaded successfully (if not, rename the original filename and try uploading again), click **[Continue]**

It should now be listed in the training Library and available for others to use.

10. Drag and Drop the new image into the page

11. Close the *Drag and Drop* window
12. **Save** the latest version of your web page

Upload a New File

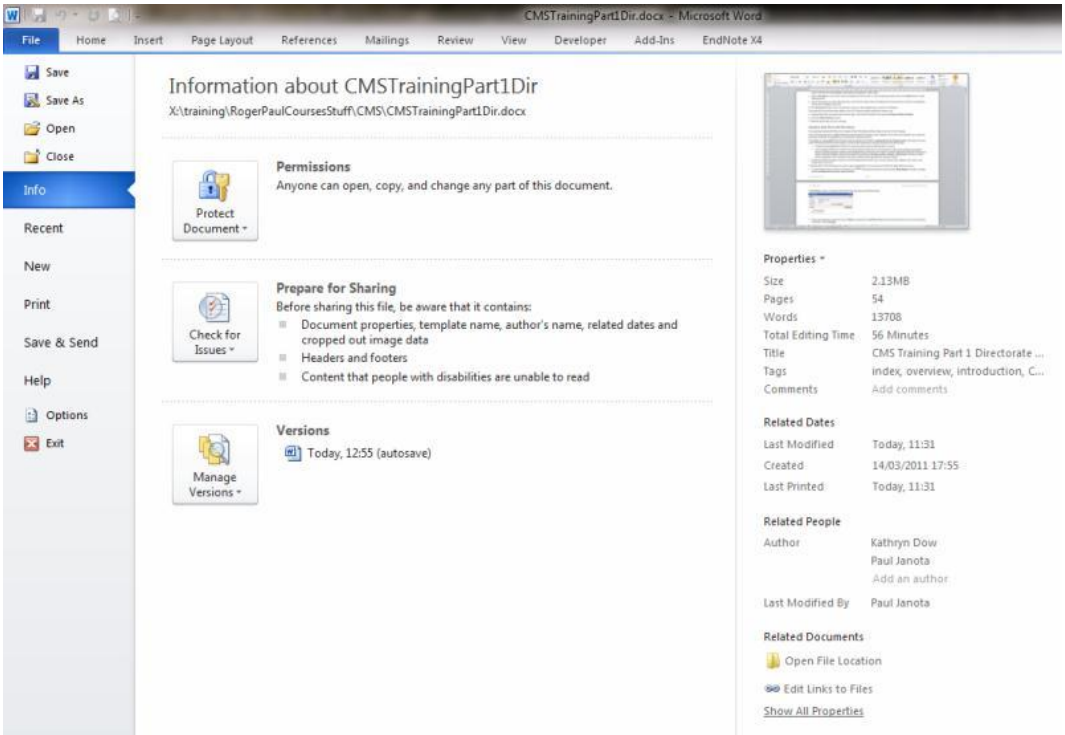
You are going to upload a file from your computer to the File Library and then create a link to it on the web page.

In the CMS training session, a **pdf** (portable document format) file already on the computer will be used as the example, but, in practice, most types of file can be uploaded (e.g. Word, Excel, Powerpoint, text etc.).

Guidelines for Creating PDF Files from Microsoft Office

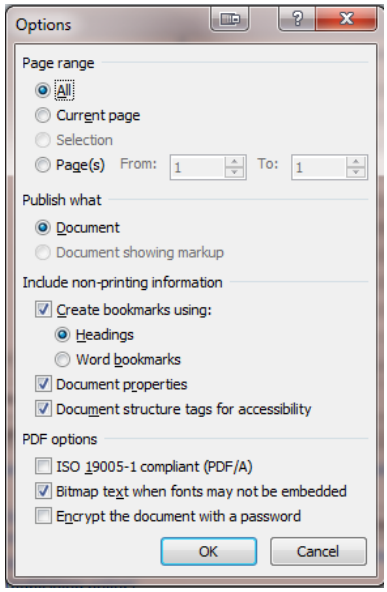
With regard to creating **pdf** files for websites, these documents will need to be **optimised for the University's Google index** so that they have more chance of being found by a search engine. Google emphasises the **document properties** of a pdf when searching, more than the pdf filename or content. To create a pdf from a Microsoft Office application like Word 2010/2007, the following guidelines should help:

- Make sure the document's properties in Word are setup correctly by clicking on the **[File]** tab in the top left-hand corner of the window (the Office button in 2007), and choosing the **Info** option – you'll get a screen similar to below:



- You'll see the document's properties on the right of the screen. Click on **Properties** and choose **Advanced Properties** (you could also use the **Show Document Panel**). The most important fields to fill in and make sure are setup correctly are **Author**, **Title**, **Subject** and **Keywords**. The title is equivalent to the page title of a web page, the subject to the page description, and the keywords are usually important words or phrases in the main content which are separated by commas or spaces

- Look at the University Default document guidance for the use of PDF for University documents at http://www.reading.ac.uk/internal/its/help/its-help-document-defaults.aspx - the latter part of this web page tells you how to configure Microsoft Office to **save as PDF** for both Office 2010 and 2007. It is easier in 2010 as it is built-in whereas in 2007 you may have to download a tool before first use
- Note that when saving as PDF, it is best to **Optimize for: Standard (publishing online and printing)**
- After clicking on the **[Options]** button:



  - make sure that the box next to **Document structure tags for accessibility** is ticked
  - if you are creating a PDF from Word and have used **Word Heading styles**, tick the box next to **Create bookmarks using:** and choose **Headings**
- Click on **[OK]** to save the options and then **[Save]** to save as a pdf

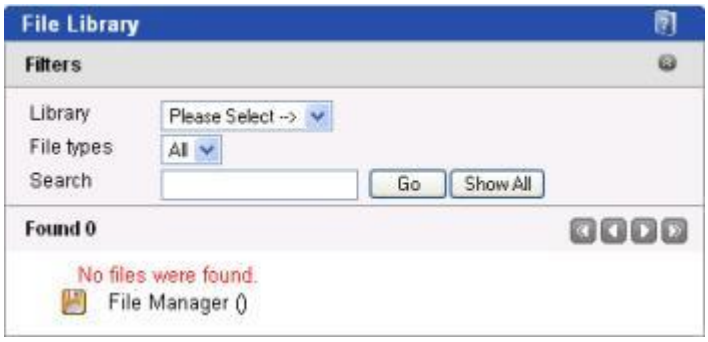
Upload to the File Library

1. Position yourself on the CMS web page where you want the linking text to the file to go. You may need to press **<Enter>** a few times to put yourself onto a new line

To upload a file to the File Library, you need to open the **Files** library. You cannot access it from the Drag and Drop window.

2. To open the File Library, click on the Libraries icon  just under the title bar at the top of the *Page Explorer* window, and then click on the **Files** link in the blue menu bar below

A *File Library* window is opened with the following showing on the left-hand side:

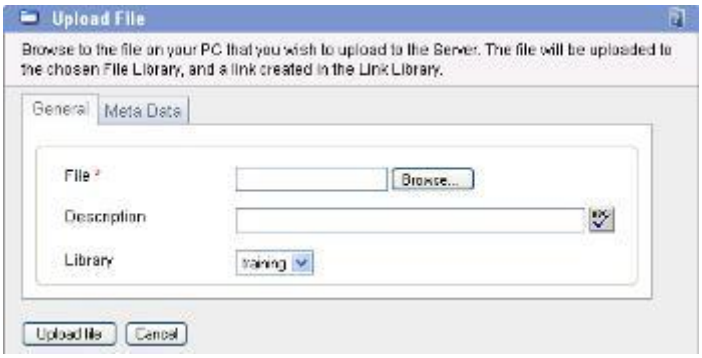


3. Click on the drop down list arrow next to **Library**, currently showing **Please Select**, and choose the library you want (on the CMS training course this will be **training**)

You might see a number of files that have already been uploaded to your File Library.

4. **Right** click on **File Manager** (above the list of files) and choose **Upload** followed by **Upload Single File** from the menu (note that there is also an option to Upload Multiple Files if you have a few to upload, but this usually requires an extra software download before it works successfully)

An *Upload File* box appears:



5. Click on **[Browse...]** and choose a file to upload from your computer. Note the following points:
   - On the training course or ITS PCs, upload one of the pdf files from the **PDF_examples** folder in the **cms_training_files** folder under the **training** folder on the **D:** drive
   - You can upload one of your own files from the network drive **N:**
   - The filename should **not contain spaces nor** the '**.**' (**dot, full stop**) symbol. If there are spaces, then on upload you will be told that the spaces will be replaced by underscores ('_') – you may need to click on **[OK]** to accept this
   - It is recommended that you don't upload pdf files **larger than 2mb** in size, although a bigger size may work
6. Enter a **Description** - this will be used as the default text for the link to the file, so write something sensible. Click on the **[ABC]** button to spell check your text
7. Click **[Upload file]**
8. Assuming your file uploaded successfully (if not rename the original filename and try uploading again), click **[Continue]**
9. **Close** the *File Library* window - you should be back at your web page

Putting the Link to the Uploaded File onto the Page

Now that the file has been uploaded, a link to it should have been put into the Link Library. You're going to drag this link onto the web page:

1. Click on the **Drag & Drop button** towards the end of the top toolbar (or go to the *Drag and Drop* window if it's still open)
2. Click on the **Links radio button** - remember to be patient!
3. Click on the drop down list arrow next to **Link Types**, currently showing *Internal Web Pages*, and select **Uploaded Files**

4. Click on the drop down list arrow next to **Library** currently showing **Please Select** and choose the library you want (on the CMS training course this will be **training**) - a list of links to uploaded files should appear
5. Click on the link to the file you want to choose - if it is **not** showing in the list then you can either use the **Search** box to find it or click on the **right arrow** button to move onto the next page of the list (usually 10 items per page)
6. Drag and Drop the **linking text** onto the page - the linking text should be showing under **Drag And Drop Selection**
7. Close the *Drag and Drop* window
8. **Save** the latest version of your web page

Note that you can still change the linking text on the page by editing it directly or via the alternative linking text method, but this will **only** change the linking text on that page and **not** in the File Library.

Uploading a Replacement Image or File

If you want to replace an existing image/file with a new one then rather than delete the original and upload the new image/file, it's better to **upload a replacement**:

1. Open up the relevant multimedia or file library (**Libraries** followed by **Multimedia** or **Files**) and find the image/file you wish to replace with a new version
2. **Right** click on the image/file and choose **Tasks** followed by **Upload Replacement**
3. **Browse** to the image/file on your PC that you want to use as a replacement and click **Open** - note that the **Description** for the image/file is the original one that was given
4. Click the **Upload File** button
5. For the updated image/file to be visible on the live website, it needs to be **published**:
   - For an **image**, **open the page** with the image and **submit** and **publish** the page
   - For a **file**, **right** click on the name of the file within the File Library list and select **Publish** followed by **Publish File** and finally **Continue**

Note that the old image/file will be replaced with the new image/file in any page where this image/file was previously added.

Using a Library Section for Shared/Common Information

Putting in Contact Details

Text (Section) items should be put into a special **section** Library when they are likely to be used in more than one location. Once there, they can then be used on relevant web pages. An example of shared information could be contact details.

You're going to put in some contact details (e.g. email address and telephone number) for your directorate or department/school into the second empty section under the *Things to do now* box (if this isn't empty then use one of the middle sections if one is empty):

1. Click in the **second** empty section under the **Things to do now** box
2. Click on the drop down list arrow next to **Normal** at the start of the second toolbar and choose **Heading 4** from the list
3. Type in **Contact us** (your text should appear in bold) followed by pressing **<Enter>**
4. Turn on bullets by clicking on the **[Bullets]** button

Since we are in the *Things to do now* box, the stylesheet turns the bullet point into an arrow. You may find that the page display goes funny – to solve this, save the latest version of the web page:

5. Click on the **[Save]** button on the toolbar
6. Next to the arrow, type in **Email:** followed by pressing **<Shift Enter>** (you may need to press it 2 times)

This puts you onto a new line, but will not bring up the next arrow. This is also sometimes known as a **soft return** (equivalent to a <br /> code in HTML).

You're now going to insert an email address for your directorate or department/school, but instead of just typing it in let's try and create a link to it:

7. Click on the **Drag & Drop button** (the one with the arrow) towards the end of the top toolbar. A *Drag and Drop* **window** will appear
8. Click on the **Links radio button**
9. Click on the drop down list arrow next to **Link Types** and choose **Email Addresses** from the list - a new list of currently setup mail address links will be shown below (there may be quite a few!)

You're going to setup an email address link for your directorate or department/school. It's probably best to check the existing set of email address links to see if it has already been entered.

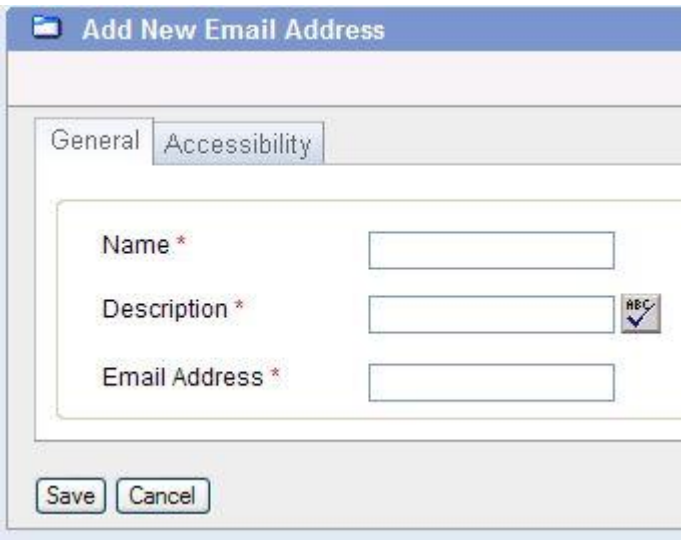
10. Click in the text box next to **Search**, type in the **first part of the email address** (the part before the @ symbol), and click **[Go / Refresh]**

A list of matching email address links will be shown if there are any. If one already exists for the link you are going to add then you can miss out the next part about creating a new email address link (jump to step **16**).

If **no** matching email address link appears:

11. Click **Create a Link** at the top of the email addresses links list

An *Add New Email Address* box appears:



12. Click in the box next to **Name** and enter a name for your email address link

This is for internal reference within the CMS and should **not** contain spaces. The format being used on the live site is similar to **x_y_zzzzzreadingacuk** where x and y represent the person's initials, the underscores replace dots, and the zzzzz represents the person's surname (if it includes a hyphen then keep this). In the case of a directorate or department/school email address, it may just be one word.

13. Enter a **Description**

This will be used as the default text for the link that appears on the web page. Make it the full email address or, if this is too long, the directorate/department/school name or the first and last name in the case of a person.

14. Next to **Email Address**, type in the full email address
15. There's no need to look at the Accessibility tab so click **[Save]**

This email address link should have been added to the Link Library and made available for others to use.

16. Drag and Drop the new email address link onto the page

The link text should be showing under **Drag And Drop Selection**. If it is **not** then search for the email address and click on the name that appears under **Create A Link**

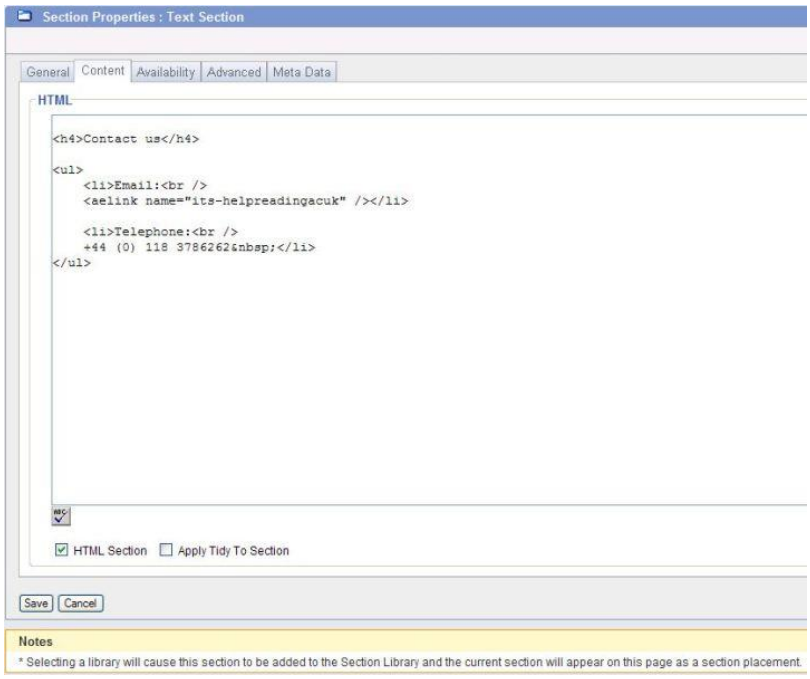
17. Close the *Drag and Drop* window
18. Press **<Enter>** after your email address – the next arrow in the list should have appeared
19. Next to the arrow, type in **Telephone:** followed by pressing **<Shift Enter>**
20. On the next line, type in the phone number for your directorate or department/school (this will probably be the enquiries or reception number). You may like to make it the full number with all the codes, as if you're calling from abroad
21. **Save** the latest version of your web page

Turning the Contact Details into a Shared Section

This section with the contact details would probably be used on more than one of your web pages, so it would be worth adding this section to the section library so that it can be shared. The way to do this is as follows:

1. Click somewhere in the **contacts** section under the Things to do now box – it should have a **red** dashed outline
2. Move to the **blue vertical bar** on the left-hand side of the *Page Explorer* window and click on the **red** Text Section (usually the sixth refers to the contact details).

Something similar to the following *Section Properties : Text Section* window should appear:



Note that you can do a **spell check of this section** through the **[ABC]** button and that the **HTML** code used in this section becomes visible.

3. Click on the **Advanced** tab at the top of the window - it will change to something like:

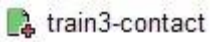
At the bottom of the window is an **note in yellow** that states that s**electing a library will cause this section to be added to the Section Library so that it can be shared.**

4. Click on the drop down list arrow next to **Library** currently showing **[No Library]** and choose **the relevant library** (**training** on the CMS training course)
5. Click on the **General** tab at the top of the window

It's a good idea to change the name from **Text Section to something that** is easily recognisable to you:

6. Type in the new **Name** - note that there can't be any spaces (on the CMS training course, use something like **train3-contact** where **train3** is your main area prefix)
7. Click on **[Save]**

If you move to the **blue vertical bar**, you should now see the new library section with the name you gave it, indicated by a small **red plus/cross** attached to it, for example:



Note that Content Contributors can only save sections to libraries that they can update.

Putting a Shared Section onto another Page

Now you're going to put the contacts section into a new page. Firstly, you have to close the current page (remember that you can **only** work on one CMS page at a time):

1. Move to the **blue vertical bar** and **right** click on the **page name** at the top (e.g. tr10-standardpage)
2. From the menu that is displayed, click on **Page Locking** followed by **Check In Page**

This will ensure that if someone else needs to edit this page later, they can do it because it isn't locked out to you.

3. **Close** the Page Explorer window (where the current page is showing)

The next step is to open up another page where you want the shared content to go:

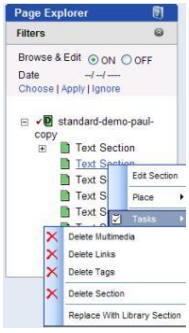
4. Go to the *Area Manager* window and click on the subarea that contains the other page (on the CMS training course, this will be the **Contact us** area)
5. Click on the **page name** of the page that you want to open (on the CMS training course this will be something like tr9-contact-page)
6. If you cannot edit the page then click on the yellow padlock, the **Check Out Page** button

You're ready to look for an existing **Section Library** to put onto our web page:

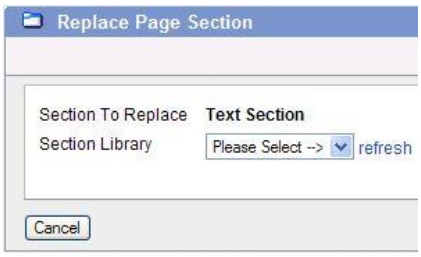
7. Click in the **second** empty section under the *Things to do now* box

The above step assumes this section is empty. If not then choose a different section or page, otherwise the existing section may be overwritten.

8. Move to the **blue vertical bar** and **right** click on the **red** Text Section
9. From the menu that is displayed, click on **Tasks** followed by **Replace with Library Section** as shown below:



A **Replace Page Section** window appears:



10. Click on the drop down list arrow next to **Section Library** currently showing **Please Select** and choose your Section Library (on the training course it will be **training**). A list of the sections in this library is displayed
11. Click on the **radio button** next to the section you want (on the training course there may be one similar to **train3-contact**), and then click **[Replace]**

In this case, you're replacing an empty Text Section. The new Library Section should now be showing on the page.

12. **Save** the latest version of the page

You can change the contents of a Library Section just by editing it on one of the pages where it is placed. As an example:

13. Change the telephone number in the contacts Library Section on the current page
14. **Save** the page
15. **Check out** this page and **close** the *Page Explorer* window
16. Open up a different page that has the same contact information

You should find that the contacts library section on this page has also changed to show the new phone number (another way to edit a library section is to open up the Sections Library, find your section and change it there).

If you find that you no longer want a Library Section then **before** you delete it, you need to find out its order. This is because after deleting the Library Section, your page will completely change and probably look a mess as the order of the sections will have changed. To find out the order of your Library Section (or any Text Section), click on the link to that section on the page, and choose the **Advanced** tab from the *Edit Section Placement* window that opens – this will show you're the current order of that section.

Once you have deleted the Library Section, you will need to **add** a new empty Text Section that has the order of the Library Section that you deleted. To do this, move to the **blue vertical bar** and **right** click on the **page name**. Choose **Add** from the menu followed by **Section (Editor)**. In the *Add New Section* window that appears, click on the **Advanced** tab, change the **Order** to the correct value and **Save** what you have done.

Linking to Social Media Profiles through a CMS Tag

A CMS tag has been developed that allows you to easily add links to your Department's social networking profiles into your website. These include links to profiles on Facebook, Twitter, YouTube and LinkedIn.

If an alternative implementation from the one specified or other links are wanted, please contact the Content team (**content@reading.ac.uk**) for advice on how best to proceed.

The relevant advice on setting these up can be found in the **Digital Development Organization** in **Blackboard** in the **Advice and guidance wiki** under **Social Media, Web 2.0 - How to add social media links to your website (CMS tag)**. It's also available on Yammer at https://www.yammer.com/reading.ac.uk/notes/834565

Further useful links in the same area of the above wiki are:

- **How to add 'Share this' social media tags to your CMS web pages**
- **How to add your tweets to your website (CMS tag)**

More Advanced Link Options

Linking to Different Parts of the Same Page

There are two possible ways of doing this, one **using anchors** and the other by **editing the HTML code**.

The first method of **using anchors** is easier, and is described below:

1. Move to the position on your page where you want the anchor to be. This is the place where the link will jump to. Typical examples are a particular sub heading or back to the top of the page
2. To create the anchor, click on the **Insert Anchor** icon towards the end of the second toolbar
3. An *Insert Anchor Tag* window will appear. Enter an **Anchor id** (a recognisable name such as the sub heading itself, but note that the id *cannot contain spaces* and certain other characters) and then click on the **[Insert Anchor]** button
4. To double check that the anchor was inserted successfully, click on the **Toggle Anchors** icon to the right of the Insert Anchor icon on the toolbar. An anchor symbol will be shown on the far right of the line on which it was inserted (clicking on the same icon will make the anchor symbol disappear)
5. Save the latest version of the web page by clicking on the **[Save]** button on the toolbar

After inserting an anchor and saving the page, a corresponding **anchor link** is automatically created in the Link Library. Drag and Drop can be used to place the link in the correct position on the page:

6. Go to the *Drag and Drop* window if it's still available or click on the **Drag & Drop** button
7. Make sure the **Links radio button** is selected (click on it if necessary) and that *Link Types* is set to **Internal Web Pages**
8. The anchor link is put into the same area as the page that you created the anchor in, so click in the *Search* box and type in the **page name** of the relevant CMS web page. Click on **[Go/Refresh]**

One of the links that appears in the list will be the anchor link. The anchor link will appear as **pagename_Anchor_anchorname**, where **pagename** is the name of the page the anchor's on and **anchorname** is the name you gave to the anchor.

9. Click on the anchor link and wait for the linking text to appear
10. Move to the linking text underneath *Drag And Drop Selection* and drag (or place) it over to where you want it on the web page (for a link that jumps to a sub heading further down the page this will probably be near the top of your page)
11. Save the latest version of the web page by clicking on the **[Save]** button on the toolbar

To check if your anchors are working, you can view the draft page in any browser at **www.cms.rdg.ac.uk/draft/rest-of-path** where 'rest-of-path' represents the web address to the page (including any subareas and the page name). The draft page will be updated with every save you make. Alternatively, you can publish the page.

Sometimes, the above method does not always work, e.g. the anchor link cannot be found. In this case, advice on **editing the HTML code** can be found in the **Digital Development Organization** in **Blackboard** in the **Advice and guidance wiki** under **Useful CMS Things** and **Add anchor links to a CMS page**.

Deleting Pages or Links

Before deleting any pages or external links from within the CMS, use the **link library** to check to see if they are being linked to on any other pages within the CMS, i.e. other people are using them. To do this:

1. Click on the **Libraries** icon  just under the title bar at the top of the *Page Explorer* window (or whichever CMS window you have open), and then click on the **Links** link in the blue menu bar below
2. In the *Link Library* window that opens, use the *Search* box to find your internal web page or your external link
3. In the list of links that appear, *right* click on the appropriate link and choose **View** followed by **Placements**. A list of *Link Placements* will appear on the right
4. Use the mouse to hover over the page/section title for each occurrence to see the *folder path* and *page name*

If there are *no* link placements, or the only ones that appear go to pages that you can edit (properties) or explore (open the page) then it will be safe for you to remove the page or external link.

Conversely, if there are a number of link placements that you are *not authorised* to see then this means that other peoples' pages are using your page or external link. If you still want to delete the page or external link, use the information obtained from the folder path and page name (if this still doesn't help then contact its-help@reading.ac.uk) to find out the owners of the other pages so that you can point them to the new location of information or inform them that it is being removed completely.

How to Make an Image Link through to a Page

This is *not* usually recommended as it makes the page less accessible, but if you still want to have an image link through to a page then do the following:

1. *Drag and Drop* the **link** you want to use from the Link library onto the desired page section.
2. *Drag and Drop* the **image** you want to use from the Multimedia library (which should be already uploaded and published) onto the page next to the link text.
3. **Save** the page
4. Finally, on the page, drag the image **on top of** the link text. It will look as though the image is chopping up the link text, but when you **save** the page again, the link and the text merge together and create an image link

Using the All Links Option

This can be useful if you want to link to a file that has been put up on another CMS web page, but you don't have access to it through your CMS libraries.

To test it out, you need to have a page open and be positioned in the right place. You will then use the drag and drop to find your link as follows:

1. Click on the web page that you want to work on

2. Position yourself on the page where you want the new image to go. You may need to press **<Enter>** to put yourself onto a new line
3. Click on the **Drag & Drop button** towards the end of the top toolbar. A *Drag and Drop window* will appear
4. Click on the **Links radio button** - remember to be patient! It will eventually show *Link Types* (instead of Library)
5. Use the **Search** box to find what you want to link to by typing in a relevant **keyword/phrase** that you think will form part of the name of the link (remember that CMS link names have no spaces and can contain the '_' or '-' symbols to join up words)
6. Click on the drop down list arrow next to *Link Types*, currently showing *Internal Web Pages*, and select **All Links** (at the bottom)

A list of the links that it matches will show. The following icons, in front of the link name, indicate what type of link it is:

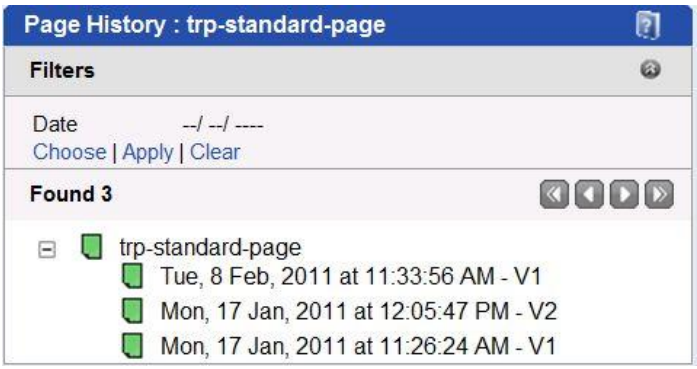
- - Internal web page link
- - External web page link
- - Email address link
- - Uploaded file link

7. Click on the name of the link you want to choose
8. Drag and Drop the **linking text** onto the page - the linking text should be showing under **Drag And Drop Selection**
9. Close the *Drag and Drop* window
10. **Save** the latest version of your web page

More Page Options

Page and Section History

Note that it is possible to look at previous published versions of the page by **right** clicking on the page name and choosing from the menu **View** followed by **View History**. A **Page History Manager** window will open up that shows on the left-hand side something similar to:



Clicking on one of the listed published versions will then allow you to click on a link that says **View in new window**, and that published version of the page will show.

Note that this only allows you to **view** a previous published version of the page and **not** to return the current page to a previous version. For information on **returning a section of a current page to a previous version**, see page 8 of the Activedition v4 administrator manual at http://www.reading.ac.uk/web/FILES/www_File_Library/v4-administrator.pdf (**only** available to **CMS sub administrators**).

Unpublishing a Page

The **unpublish** feature can be used to remove pages from the live site but retain a copy within the CMS. To be able to use it, the following points should be noted:

- It's **only** available to **CMS sub administrators**
- A page must be set to approval/awaiting publish (**A**) status, at which point the option becomes available under **Publishing**
- At present the option is available from both the Area Manager and Page Explorer, however it **only** works if triggered from the **Page Explorer** (when the page is open for viewing and editing)

Checking In All Pages

If you find that a page you want to edit is checked out to someone else so that you can't edit it (they may have forgotten to check in the page and then gone on leave or even left), then as a **CMS sub administrator** you should be able to **Check In All Pages** for the subarea containing the page by:

- **Right**-clicking on the **subarea name**, and choosing **Page Locking** followed by **Check In All Pages** from the menu

You can then check in all pages regardless of who have them open, and even apply this to subareas below the area you are in.

Page Gives a System Error

If, on trying to open or save a page, you get a **system error** rather than the contents of the page appearing (or it says that the **web page cannot be displayed**) then it is likely that something is wrong with the HTML code behind the page (the CMS does not like extra/unmatched HTML codes that haven't been finished off correctly) or that an uploaded image or link has got corrupted.

A method to get around this error that often works is as follows:

1. Move to the **blue vertical bar** on the left of the page
2. Click on the **down arrow circle/button** to the right of **Filter**
3. Turn **Browse & Edit** to **Off**
4. **Close** the page
5. **Open** the page again and move to the **blue vertical bar**
6. Click on the relevant **Text Section** where you think the problem may be and, depending on what the problem is, either edit the HTML or remove the offending image/link
7. **Save** this new version of the text section, and the page will hopefully (!) reappear within the CMS editor

If the above doesn't work and you're still having problems then contact its-help@reading.ac.uk

Custom Home Page Designs

Note that any significant changes to home pages need to be discussed with the Digital Development team beforehand. They may be able to do the whole design at a certain cost, or elements could be 'borrowed' and coded in by someone with the relevant knowledge in the department.

Below is a list of recently created custom home pages for various Departments/Schools. These should give you some ideas of what can be done, but please note that each was designed to meet specific user requirements of the corresponding site – i.e. most people visiting the Library website want to search the catalogue and/or find opening hours so these elements were given prominence.

Bespoke designs:

- Institute of Education - www.reading.ac.uk/education
- History - www.reading.ac.uk/history
- Food Security - www.reading.ac.uk/food-security
- Henley - www.henley.ac.uk (this one isn't actually in CMS, but could be)

Based on the default home page template:

- Typography - www.reading.ac.uk/typography
- Library - www.reading.ac.uk/library
- ITS - www.reading.ac.uk/its

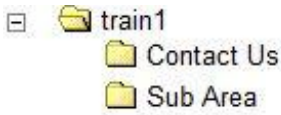
Creating a new Sub-Area

To create a new Sub-Area on the CMS:

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

In the *Area Manager* window that opens up:

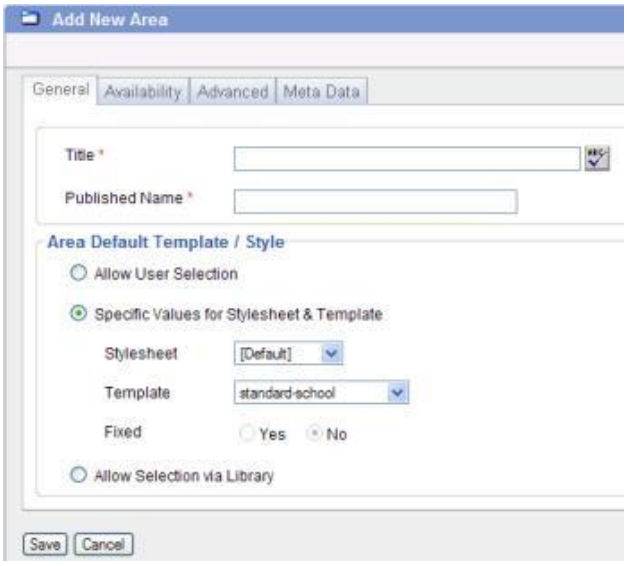
2. Click on your top-level area/folder name (on the CMS training course this will be a **train** folder, e.g. **train1**)



You are now going to create a new Sub-Area under your top-level folder:

3. **Right** click on the top-level folder
4. From the menu that appears, choose **Add** followed by **Sub-Area**

The following **Add New Area** pane will appear on the right-hand side of the *Area Manager* window. **Note** that this may take a few minutes before it appears.



You'll notice that certain names or fields have a **red asterisk** next to them. This indicates that the text box next to them **must** be filled in.

5. Click in the text box next to **Title**

The Title is the Sub-Area name that will appear in the Area Manager view in the left hand pane.

6. Type in the title that you want for your new Sub-Area (on the CMS training course, let it start with your name, without an apostrophe, followed by Area, e.g. Pauls Area. If someone else has the same name then you might have to add 2 after your name)

You'll notice that as you are typing the title, the box underneath next to *Published Name* is automatically being filled in with the same name, except that any spaces are excluded (you can change this name if you want). This is the name of the Sub-Area as it appears in the web address for the live web site.

The *Area Default Template / Style* should already be set to the recommended radio button/option of **Specific Values for Stylesheet & Template**, but the *Stylesheet* value should be changed from *[Default]*:

7. Click on the drop-down list arrow for the **Stylesheet** next to **[Default]**
8. Choose the stylesheet that you want (on the training session, choose the **training** stylesheet)

We are sticking with a **standard-school** template, so no other changes are needed here, but make sure the *Fixed* option is set to **No** otherwise you won't be able to set pages within the Sub-Area to different templates.

9. Click on the **[Save]** button to save your new Sub-Area

(On the CMS training course, you may get an error at this point, or after the Meta Properties prompt. We believe this is due to problems/slowness with the library network where the CMS training is run. There should be a **retry** option at the end of the error message. If it still fails after 2 retry attempts, carry onto the next section on creating a new page).

A **Meta Properties : Add** pane appears. There is no need to add meta properties to Sub-Areas:

10. Click on the **[Cancel]** button

The *Area Manager* window will refresh to show the *Page Manager* pane on the right-hand side, looking inside your new Sub-Area and saying **No pages were found** in red (this isn't an error as there aren't any pages there yet!).

In the left-hand *Area Manager* pane:

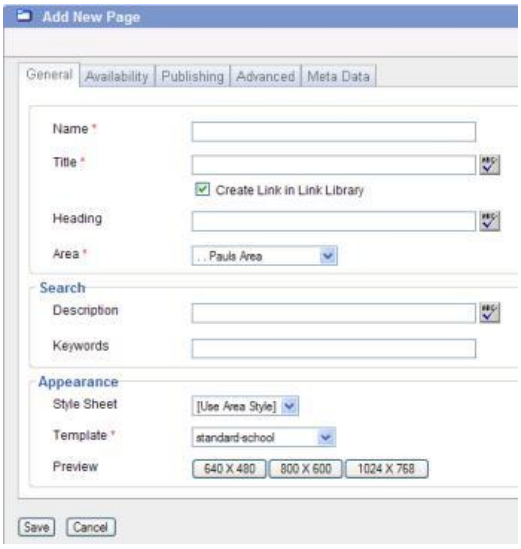
11. Click on your top-level area/folder. Your new Sub-Area should be visible

Creating a New Page

To create a new page in the new Sub-Area that you've just created in the CMS:

1. **Right** click on your new Sub-Area name
2. From the menu that appears, choose **Add** followed by **Page**

Something similar to the following **Add New Page** pane will appear on the right-hand side of the *Area Manager* window:



3. Click in the text box next to **Name**

This is where you type in your page name. Before doing this, a number of things have to be considered:

- A **naming convention** has to be followed
- The page name must be **unique** site wide
- The page name must **not** contain spaces

To help make sure that the page name is unique, the naming convention requires that the page name starts with a particular **prefix**. On the CMS, your School, Department or Directorate will have a particular prefix, e.g. IT Services use its (on the CMS training course, a training area such as **train1** should have a prefix of **tr1**). This prefix should form the start of the page name of any new page that you create in that area. To see the prefix you might be using, look at:

http://www.reading.ac.uk/internal/its/help/its-help-cms/cms/its-cms-page-naming.aspx

This prefix should be followed by a **hyphen (-)** and then some free text of the author's choice (**no** spaces are allowed in the name, although hyphens can be used to separate words). This text should be as brief as possible but preferably explicit with regard to the content of the page in order to facilitate friendly web addresses.

The page name is used as the name for the page that is published to the live web site, and will appear at the end of the browser web address (the extension of **.aspx** is generated).

4. Type in the **page name**

5. Click in the text box underneath, next to **Title**

What you type here as the title is important for the following reasons:

- It will show as the default **linking text** if a link is made to this page from another page
- It will be picked up as the **page title** and for search engines such as Google which use this **meta data** information, it will show as the linking text to the page in the search results

6. Type in your **page title**

A tick should already be in the checkbox next to **Create Link in Link Library**. It is recommended to keep it this way so that an internal web page link is created in the link library making it possible to link to this page from other pages.

7. Click in the text box next to **Heading**

The heading text appears as the main heading near the top of the page. It could be the same as or similar to the title.

8. Type in some **heading text**

The **Area** should already be setup correctly, but if you need to change it just click on the drop-down list arrow and choose another area.

9. Click in the text box next to **Description**

This is the descriptive text for a page and it is another piece of **meta data** information that will be picked up by search engines such as Google, and will show under the linking text to the page in the search results (if there is no description then Google picks up the first line of content on the page as the description). It is important that all pages have an appropriate description. Spell checking is well worth using, especially as it may be a longer bit of text.

10. Type in your **description**
11. Click in the text box next to **Keywords**

Keywords added here correspond to the **Meta Data Keywords** used in the source of web pages to describe the content to search engines. Like with the description, it is important to enter something here. The keywords should be separated by either **commas** or **spaces**.

12. Type in your **keywords**

The **Style Sheet** and **Template** settings should be left as they are, although it is possible to change these from the drop down lists.

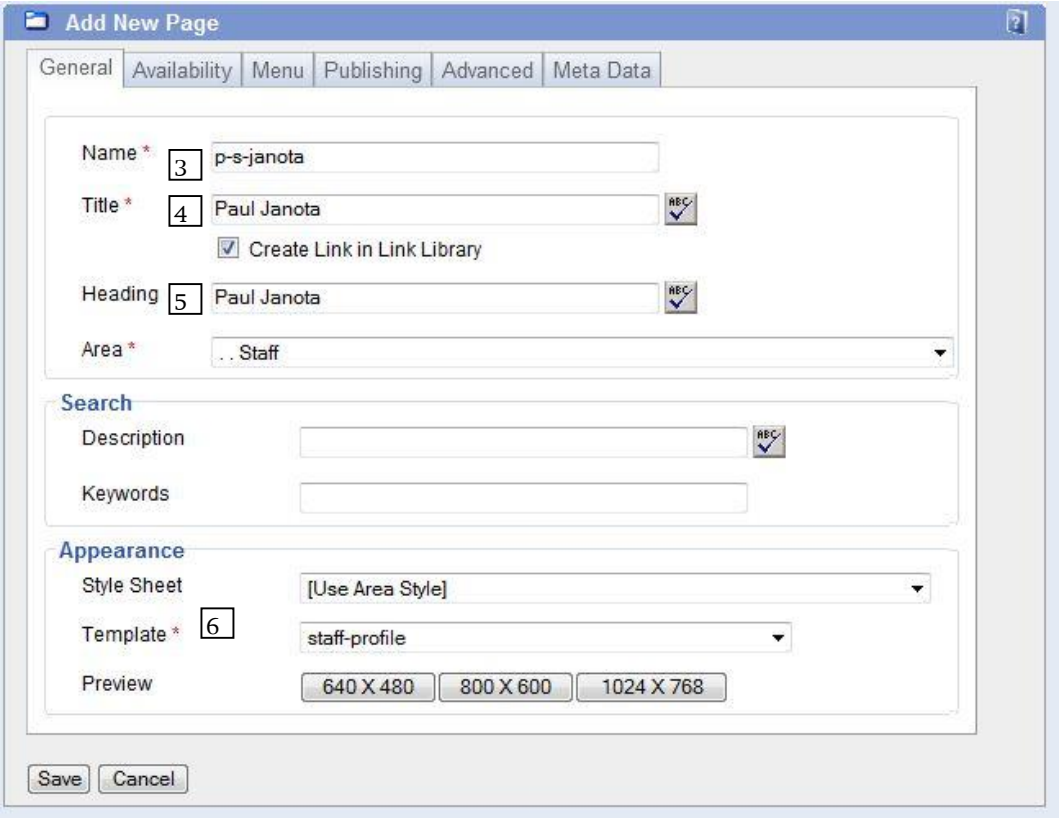
If you want this new page to be the **home page** for the Sub-Area:

13. Click on the **Advanced** tab at the top of the *Add New Page* pane
14. Make sure that the radio button/option for the *Area Home Page* is set to **Yes**
15. Click on the **[Save]** button to save your new page

The *Area Manager* window will refresh to show the *Page Manager* pane on the right-hand side with the new page in the new Sub-Area, and the new page should be opened in a separate *Page Explorer* window. You can now start to work on the page by adding content and saving.

Staff Profile Page

1. To create a Staff Profile page, create a new page as normal (**right** click on the **Sub-Area** name where the page is to be created, usually Staff, and choose **Add** followed by **Page** from the menu)
2. Fill in the *Add New Page* form as below:



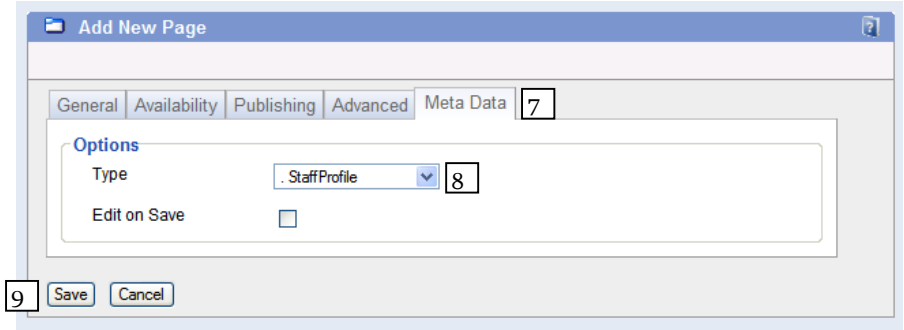
3. The **Name** should be entered as the staff member's email address as it appears before @reading.ac.uk, replacing any full stops (.) with hyphens (-) (e.g. if the email address is p.s.janota@reading.ac.uk the name for this staff page will be p-s-janota). If there is already a hyphen within the email address (in a double-barrelled surname) substitute this with a ~
4. The **Title** should be the full title of the member of staff
5. The **Heading** should be the full title of the member of staff

The **Area** should usually be setup to the **Staff** Sub-Area under your top-level area. It's also a good idea to fill in the **Description** and **Keywords** with details about the member of staff and what work/research they do.

6. The template type of **staff-profile** should be used

Note that where a member of staff works in more than one department/school (or has more than one area of work within the department), a secondary **manual** staff profile page can be setup using the **staff-profile manual** template (rather than staff-profile). If you use this template, you should name the page as you would any other, i.e. with your main area abbreviated prefix followed by the rest of the name (probably of the member of staff).

7. Click on the **Meta Data** tab
8. Select **.StaffProfile** from the drop down list
9. Click on **[Save]**



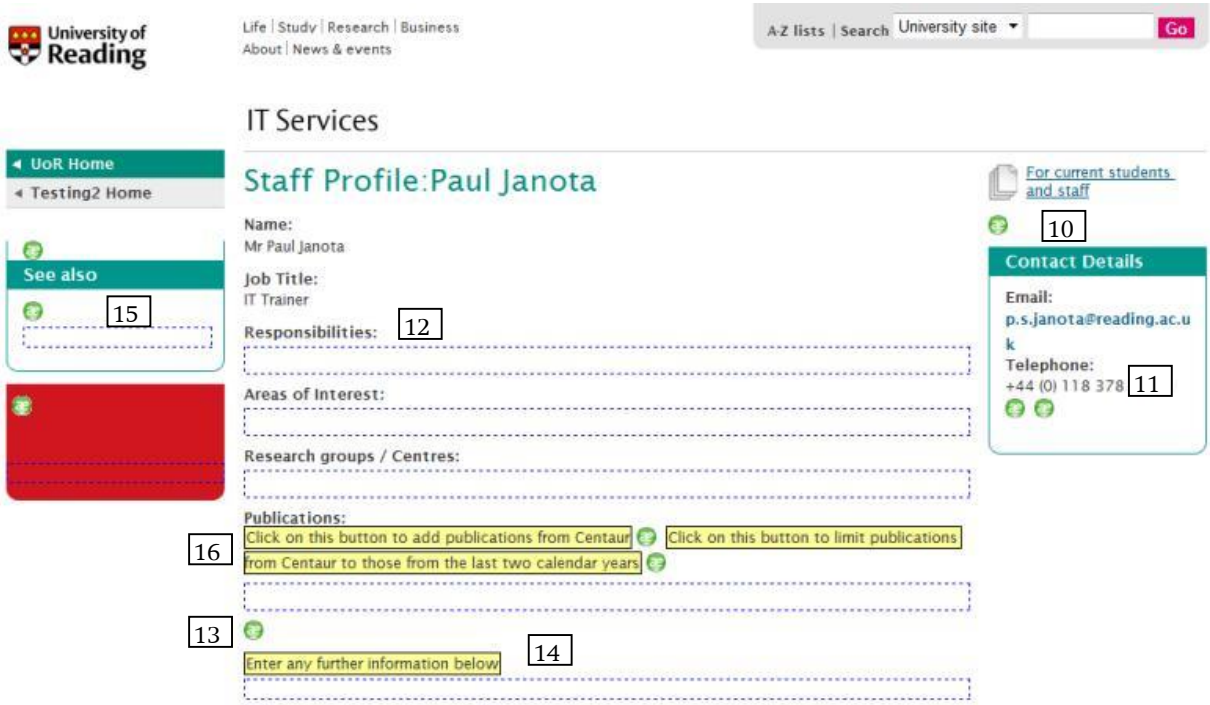
The Staff Profile page should now open in the *Page Explorer* window.

Note that sometimes, all or parts of the staff profile template are **not** picked up after saving. This is usually fairly easy to see as expected **green ae buttons** will not be showing on the page, e.g. no green buttons for Publications in the middle of the page nor for the staff photograph on the right above Contact Details.

The **simplest** solution is to **check in** the page and then **check out** the page again:

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

Hopefully, the page will now have all the **green ae buttons**, as shown in the example below:



10. A **photograph** of the member of staff can be added to the page, by clicking on the **green ae button** above *Contact Details*. Photos should be 180 pixels wide x up to 220 pixels high

Note that if you need **update** the photograph of the member of staff then you should follow the **procedure to upload a replacement image** followed by **publishing** it. If you delete the old image first (rather than clearing the placement on the staff profile page) then an error will occur and you will need to contact **its-help@reading.ac.uk** to get around this.

11. The Contact Details (email address and telephone number) will have been filled in automatically (unless it is a manual staff profile page in which case they will have to be filled in by hand). Note that there are also a couple of **green ae buttons** for the **fax number** and **building address** respectively. If your *contact details*, *name* or *job title* need updating or do not appear, please contact **hroperations@reading.ac.uk**
12. Information can now be added to the sections for *Responsibilities*, *Areas of Interest*, and *Research groups/Centres*
13. This **green ae button** can be used to add **qualifications**
14. The final section can be used to provide more information such as the career path
15. The **green ae button** next to the box under *See also* can be used to put in **other links related to the member of staff** such as a personal home page or blog, and groups or profiles on other sites
16. The staff profile template has been updated to allow automatic addition publications list from the institutional repository, **CentAUR** (**http://centaur.reading.ac.uk/**)

Publications are available for staff whose annual publications lists have already been uploaded and/or who are adding their publications directly to CentAUR. You can check the availability of publications for a particular author at **http://centaur.reading.ac.uk/view/creators/**

To **add** the publications list to a page proceed as follows:

1. Once a page using the staff profile template has been checked out, you will see a green ae button labelled **Click on the button below to add publications from Centaur**
2. Click on the **green ae button** to open a pop-up window
3. **Tick** the box labelled **Add citations for the staff member from http://centaur.reading.ac.uk** and click on the **save** button
4. The publications list will appear immediately in the CMS editor, but will not appear on the live site until you publish the page
5. You will see all publications for the staff member, but if you click on the next button, labelled **Click on this button to limit publications from Centaur to those from the last two calendar years**, you can limit the returned to list to those from the current calendar year and the previous one

If you should wish to **remove** the publication list from a page, it is not necessary to re-publish the staff profile page:

1. Click on the **green ae button** next to **Click on this button to add publications from Centaur** to open a pop-up window
2. **Un-tick** the box labelled **Add citations for the staff member from http://centaur.reading.ac.uk** and click on the **save** button
3. Mouse over the **blue vertical Page Explorer bar** at the left hand side of the screen to expand it
4. **Right** click on the **page name** and from the pop-up menu select **Meta Data** and then **Publish**

Further information about adding publications by staff into a standard page can be found on CentAUR through the following link:

http://centaur.reading.ac.uk/38385/

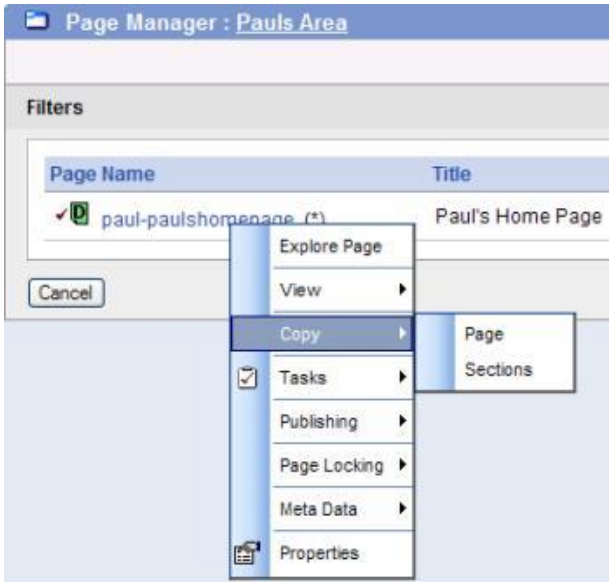
and then by clicking on the further link that says **Text (Instructions for University of Reading staff)**. Note that to access this, you may need to login to CentAUR with your University username and password.

Copying a Page to Make a New Page

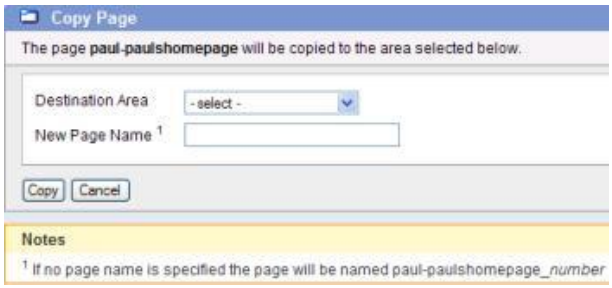
Copying a page in the CMS is fairly easy, and a quick way of getting started on a page that has similar contents to the page being copied.

Assuming you are in the *Area Manager* window with the *Page Explorer* pane showing on the right-hand side:

1. **Right** click the page you want to copy in the *Page Explorer* pane
2. From the menu that appears, choose **Copy** followed by **Page**



A *Copy Page* pane appears on the right-hand side:



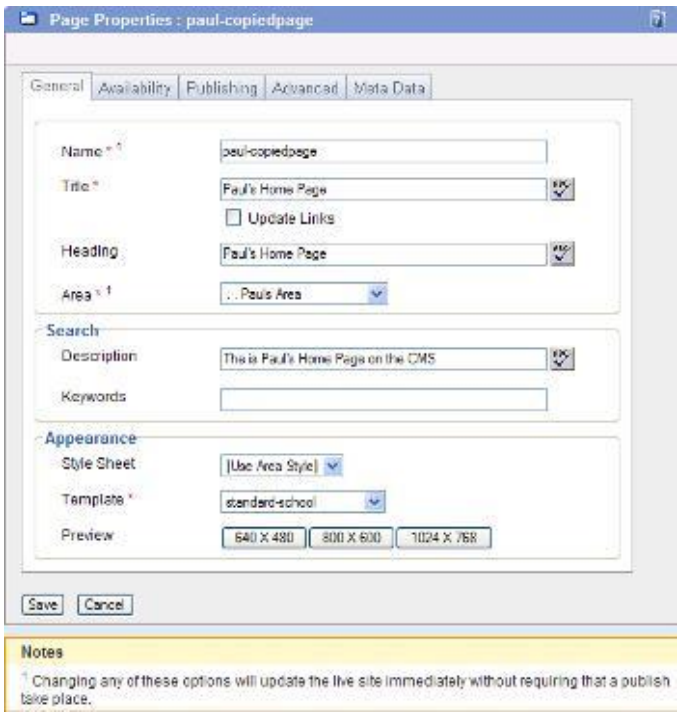
3. Click on the drop down list arrow next to *Destination Area* and select the area or Sub-Area where the copied page will be placed (it can be the same area as the original page or a different area)
4. In the text box underneath the new area, type in the **New Page Name** (the note in yellow at the bottom says that if no page name is given then it will use the original and add **_number** to the end of the name, starting with the number 1)
5. Click on **[Copy]**

If the above does **not** work and you get an error message, try again by following the same steps as above.

The page will now have been copied, but be aware that the copied page currently has the **same** title as the original page and links to the original page. It is a good idea to change this:

6. **Right** click the copied page in the *Page Explorer* pane
7. Choose **Properties** from the menu

A form called *Page Properties*, similar to the Add New Page form, will appear:



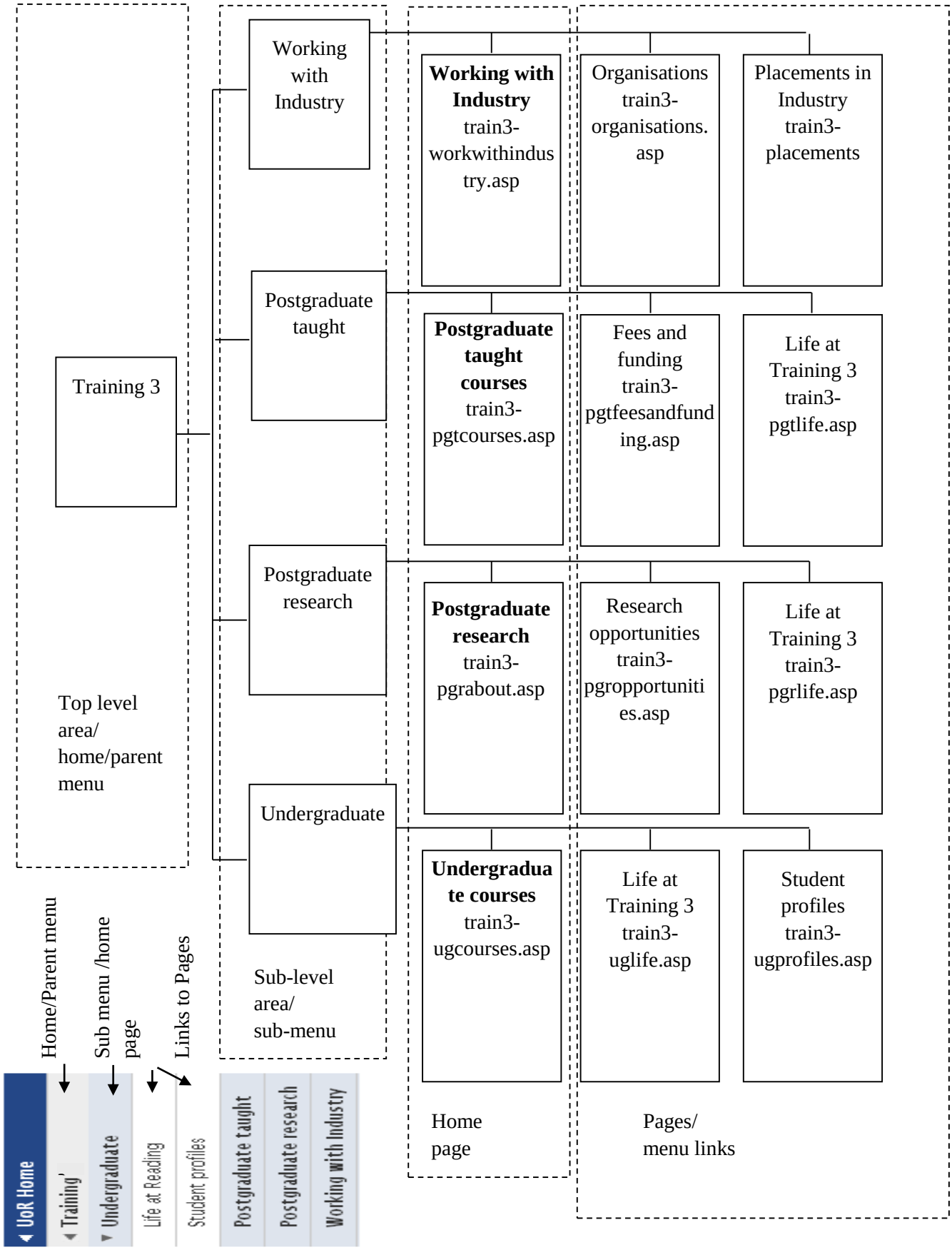
Fields that definitely need to be changed are:

8. Change the **Title** to something more appropriate for the newly copied page
9. Make sure you click to put a **tick** in the check box next to **Update Links**
10. Change the **Heading** to something more appropriate for the newly copied page (this can be the same as the title)
11. Change both the **Description** and **Keywords** to something more appropriate for the newly copied page
12. Click on **[Save]**

Menus

Menus within the CMS are built from the bottom up. Sub-menus are built first with links to pages and these are then linked to the top level menu (the **home** or **parent** menu). **Note** that an internal/external web page link can be directly linked from the top level menu without being in a sub-menu. Before starting to create your menu in the CMS, it is **useful to first draw out the hierarchy of your pages.**

In the example below, a menu is required for the School of Training3. It will need a sub-menu for each sub-area and links to pages within each sub-area. The hierarchy of this school would look as follows:


UoR Home
Training'
Undergraduate
Life at Reading
Student profiles
Postgraduate taught
Postgraduate research
Working with Industry
Home/Parent menu
Sub menu /home page
Links to Pages
Training 3
Top level area/ home/parent menu
Working with Industry
Postgraduate taught
Postgraduate research
Undergraduate
Sub-level area/ sub-menu
Working with Industry train3-workwithindustry.asp
Postgraduate taught courses train3-pgtcourses.asp
Postgraduate research train3-pgrabout.asp
Undergraduate courses train3-ugcourses.asp
Home page
Organisations train3-organisations.asp
Fees and funding train3-pgtfeesandfunding.asp
Research opportunities train3-pgropportunities.asp
Life at Training 3 train3-uglife.asp
Placements in Industry train3-placements
Life at Training 3 train3-pgtlife.asp
Life at Training 3 train3-pgrlife.asp
Student profiles train3-ugprofiles.asp
Pages/ menu links

Once you have drawn out your hierarchy and identified where you will need menus, sub-menus and links as above, this hierarchy can be built within the CMS.

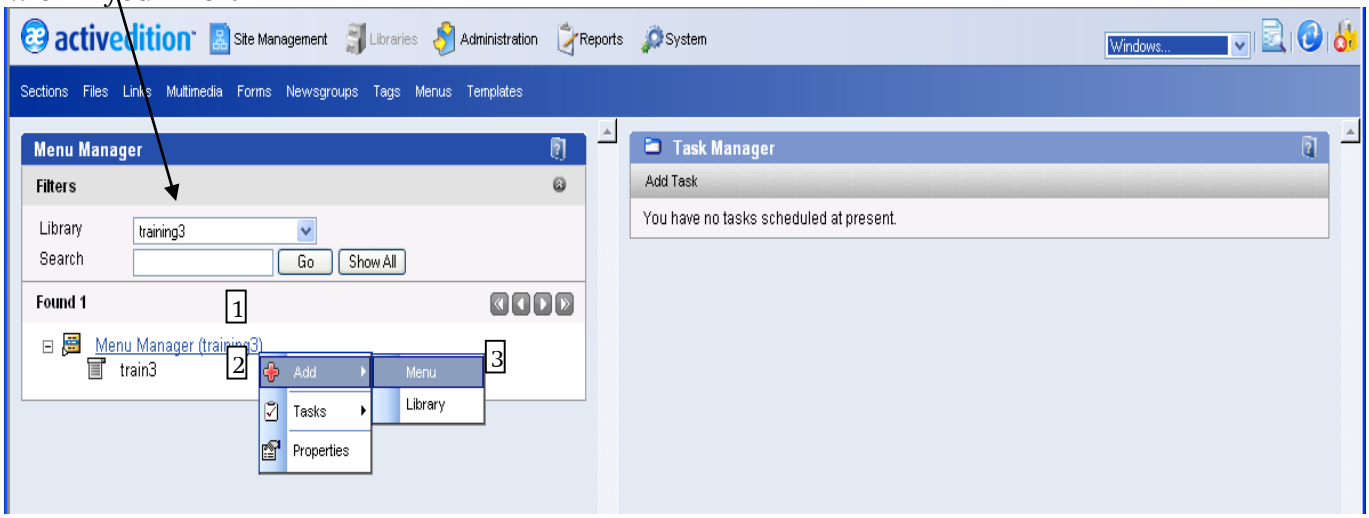
To work on menus, you need to open the Menu Manager, click on the **Libraries** icon 

in the top toolbar and then click on the **Menus** link 

in the toolbar below:

Creating a Sub-Menu

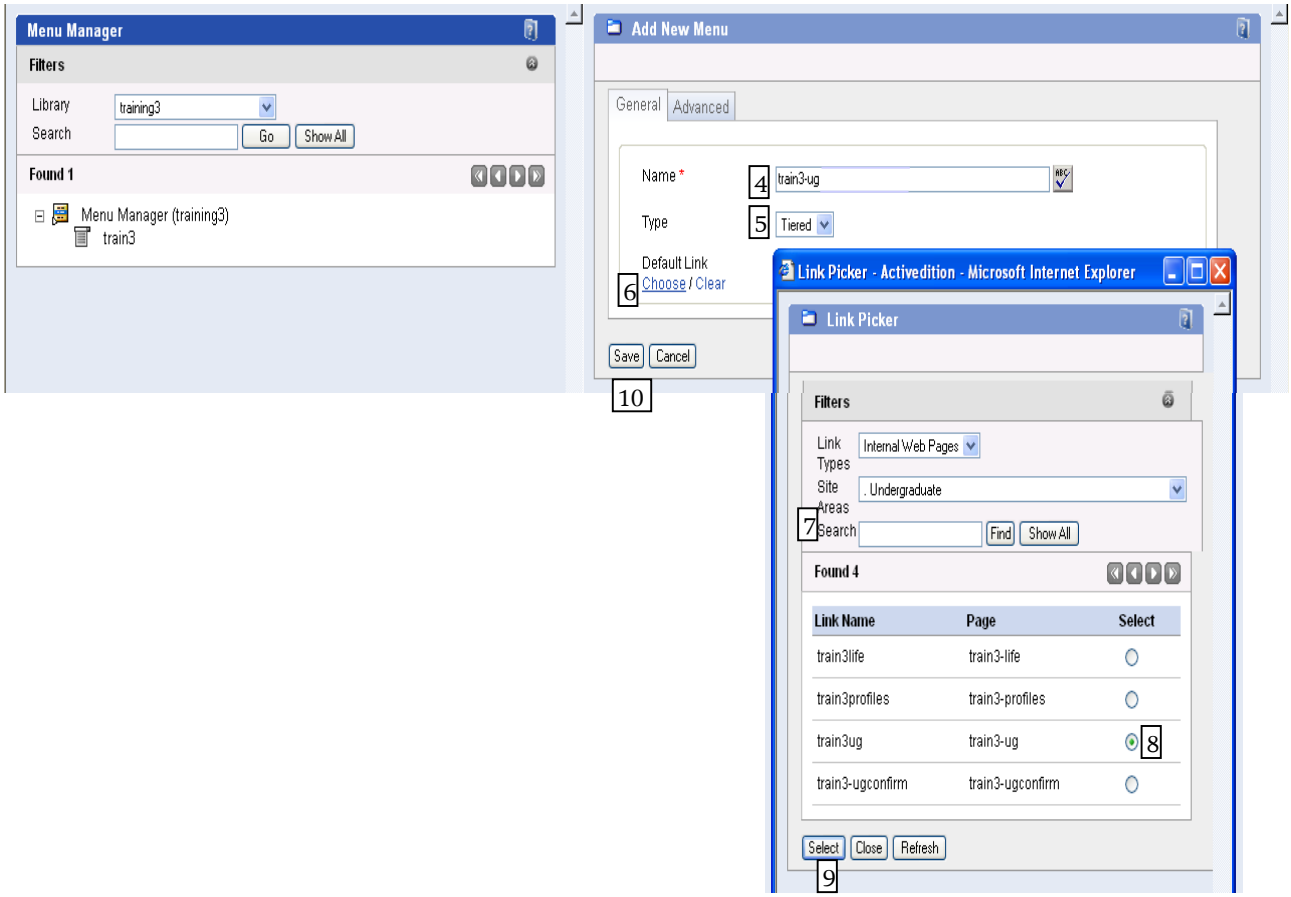
In the **Library** drop down box, select your local area. You will then be able to see any existing menus within your area:



To create your menu:

1. **Right** click over the *Menu Manager (menu library)*
2. Select **Add**
3. Click on **Menu**

The *Add New Menu* form will appear in the right-hand pane. Fill in the form with your details as follows:

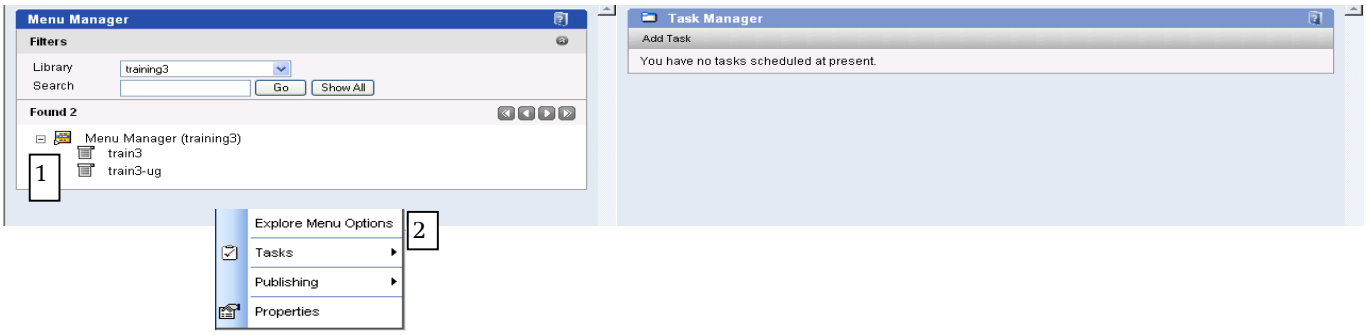


4. This is the **name** of the menu, and is used as an internal reference within the CMS only. It should begin with your unique prefix – followed by the name of the menu
5. The type should always be selected as **Tiered**
6. Click on the **Choose** link, to display the *Link Picker* window (this will allow you to select the home page that displays when this menu is used)
7. Using the **Search** box, type in the **page name** you want to link to
8. Select the page which should become the default page for this menu – this will usually be the same as the sub-area's home page
9. Press the **[Select]** button, which will also close the *Link Picker* window
10. **[Save]** the menu properties

Adding Sub-Menu Items

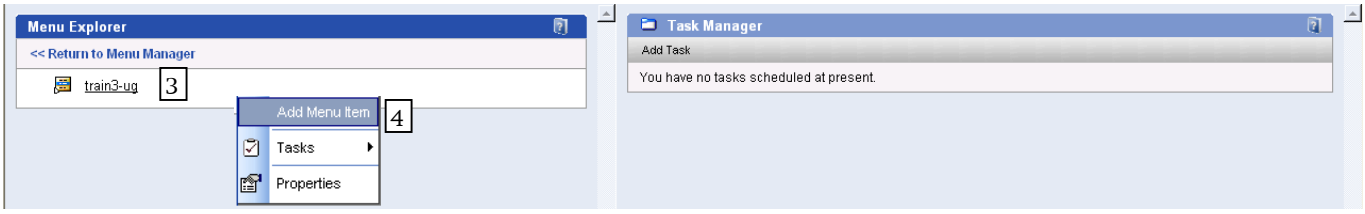
The next step is to add items to your sub-menu:

1. **Right** click over your menu
2. Choose **Explore Menu Options**

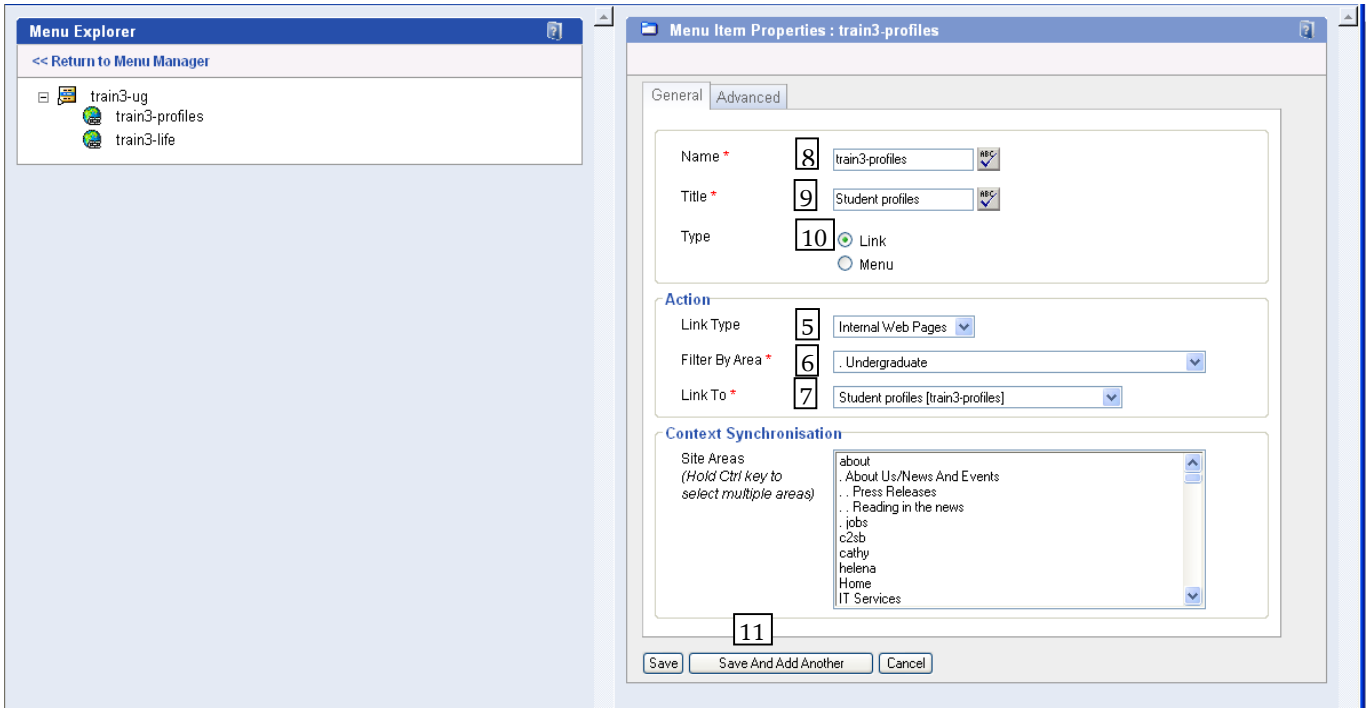


In the *Menu Explorer*, add your menu items:

3. **Right** click over your sub-menu
4. Choose **Add Menu Item**



Fill in the *Menu Item Properties* form as follows (start with the *Action* area of the form as this makes filling in the other boxes easier):



5. For the *Link Type*, choose **Internal Web Pages** (you can also have an External Web Pages link as a menu item)

6. Use the drop down list next to *Filter By Area* to find the sub-area where your page is contained
7. Select the page that you wish to *Link To*
8. The *Name* is an internal reference for the CMS only. This can be the same as the page name
9. Enter the *Title* of the menu item – this will appear on the menu button on the page
10. Choose **Link** for the *Type*
11. Press **[Save and Add Another]**. Repeat steps 5 – 11 until all links have been entered on the sub-menu
12. Press **[Save]** once you have finished adding all items to the menu. Click on *Return to Menu Manager*

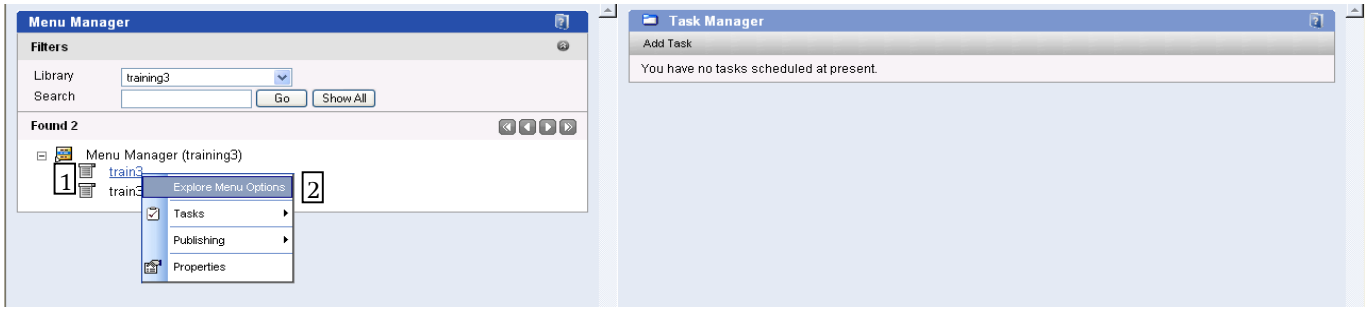
Linking a Sub-Menu to a Top-Level Menu

In the example menu hierarchy drawing shown earlier, the Undergraduate menu is a sub-menu of the Training 3 menu. This sub-menu will need to be linked into the Training 3 menu.

The top-level menu should have been created by default. On the live web site, this menu button usually has **Home** on it and within the CMS Menu manager, it shows as the **parent** menu. **Note** that with new websites, this Home button won't work until the website goes live (when it is ready to go live, contact Digital Development who will in turn contact ITS to set it up).

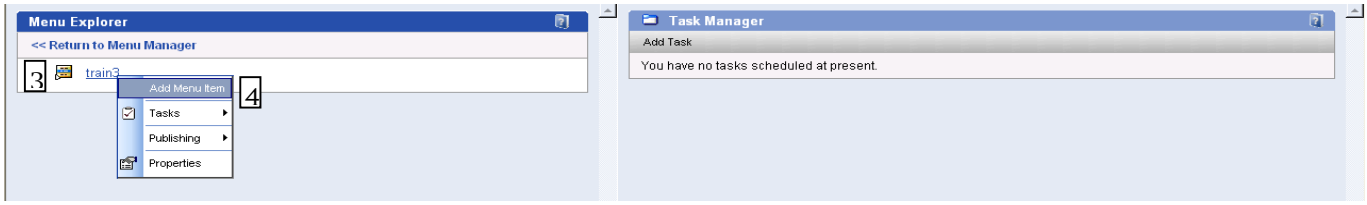
Once the basic menu has been created, you will next need to link the sub-menu into the top-level menu, as below:

1. **Right** click over your top level menu – in this example this is the train3 menu
2. Choose **Explore Menu Options**

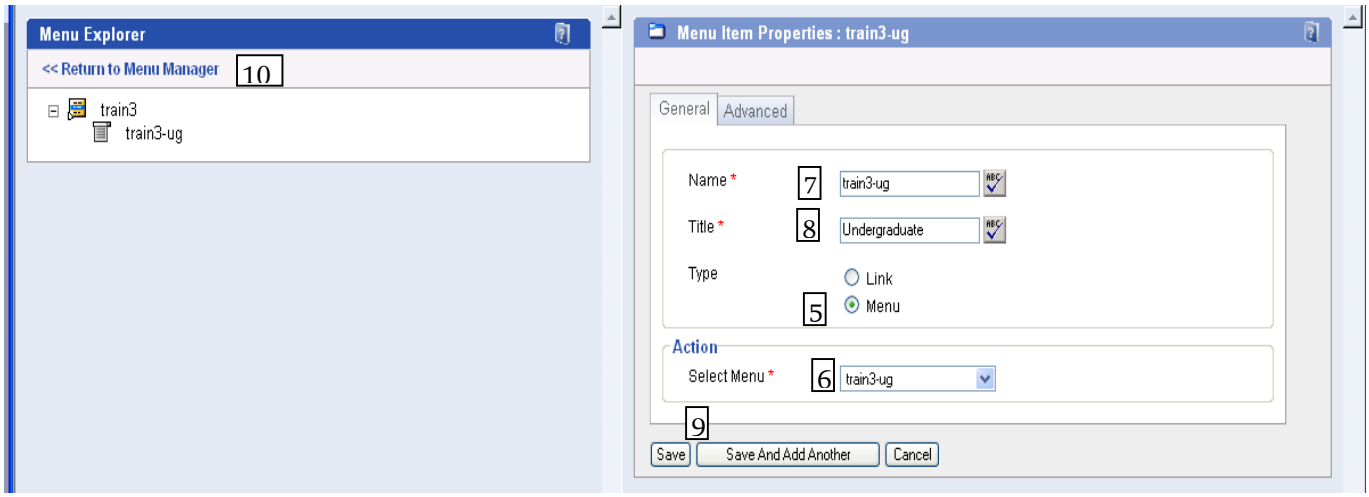


You are now in the *Menu Explorer*:

3. **Right** click over your menu
4. Choose **Add Menu Item**



Fill in the *Menu Item Properties* form as follows:



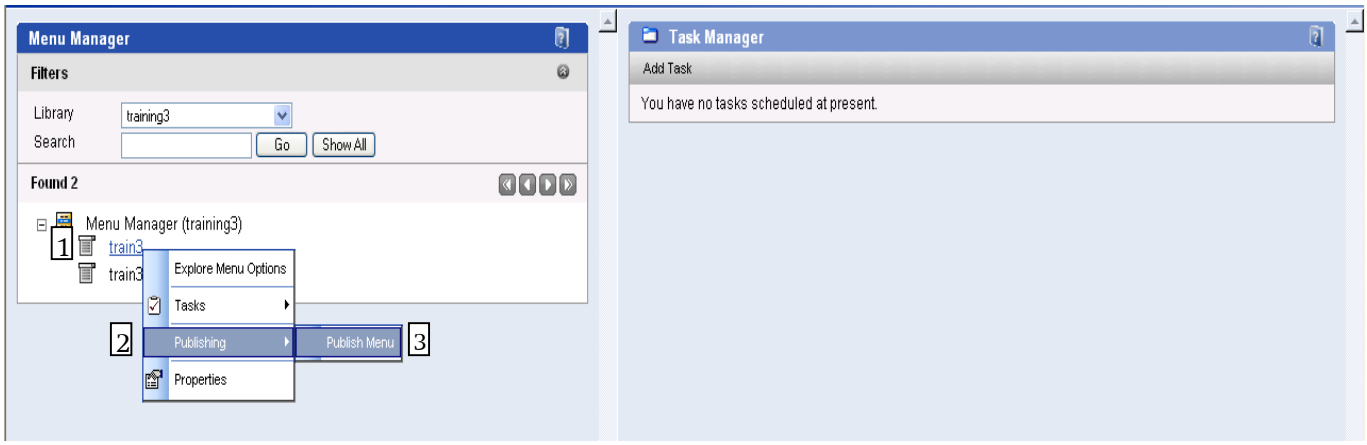
5. Select the **Menu** option (as we will be adding a sub-menu)
6. Use the drop down list next to *Select Menu* to find the menu that you would like to add
7. The *Name* is an internal reference for the CMS and can be the same as the name of the menu
8. Enter the *Title* of the menu item – this will appear on the menu button on the page
9. Press **[Save And Add Another]** to add further sub-menus or **[Save]** to add this sub-menu only
10. Click on *Return to Menu Manager*

Publishing Menus

Before publishing, you can check that your menu buttons are working (apart from the home/parent button) by opening any CMS page and clicking on the menu buttons.

Once the menus have been set up, the top level or **parent** menu will need to be published for the menu buttons to appear on the live site (**note** that you need to have a sub-administrator role to do this).

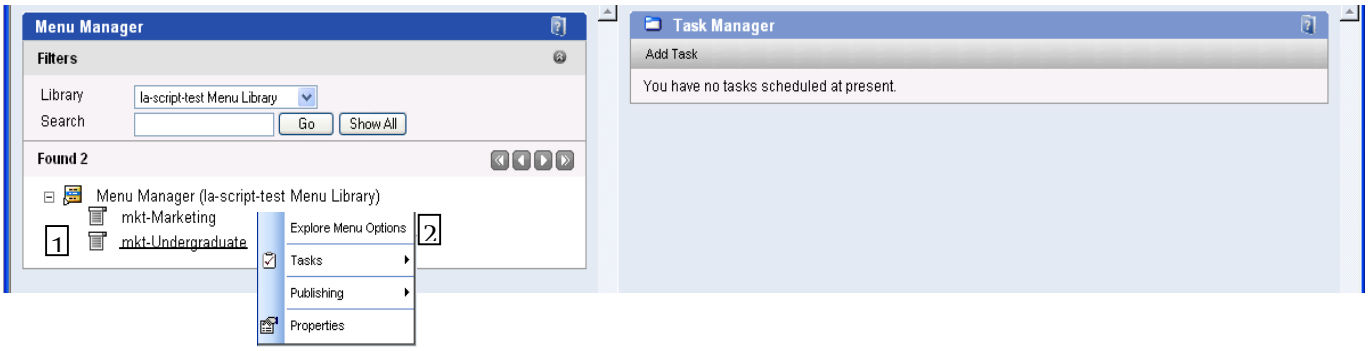
1. **Right** click over the **parent** menu (in this example train3)
2. Select **Publishing**
3. Select **Publish Menu**



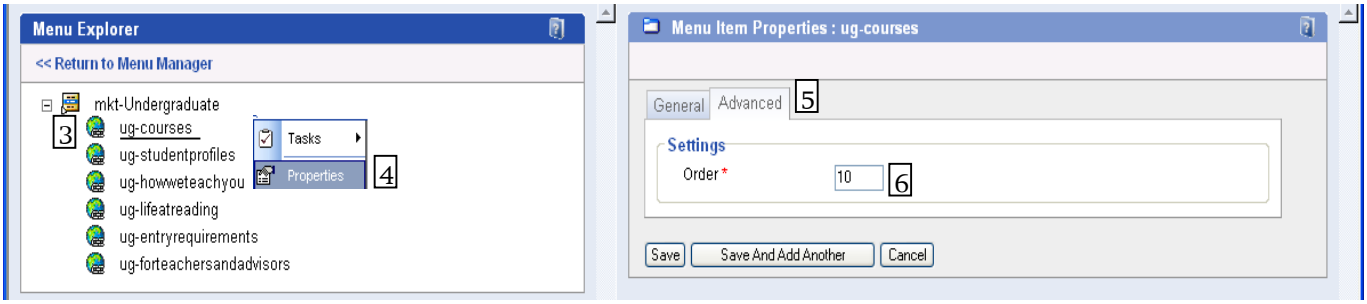
Re-ordering Menus

The order that items appear in a menu can be changed by going into the *Menu Item Properties* as follows:

1. In the Menu Manager, **right** click over your menu.
2. Choose **Explore Menu Options**



3. **Right** click over the menu item that you wish to re-order
4. Select the **Properties** option
5. Click on the **Advanced** tab
6. Change the *Order* number



Note that the lower the number, the higher up the menu this item will appear. In the example above, to change ug-courses to be the second item in this menu, change the order number to 25.

Websites and Contacts

Reference/Document	Website address
Web CMS Training Part 1 & Part 2 + Sub (local) Administrator notes	http://www.reading.ac.uk/cms-training/
Web address to login to CMS	http://www.cms.rdg.ac.uk/ae
University of Reading Image Bank	http://www.reading.ac.uk/imagebank
Copyright	http://www.reading.ac.uk/internal/imps/Copyright/imps-copyright.aspx
Adding Audio and/or Video	https://www.reading.ac.uk/closed/its/help/its-help-forms/it-av-upload.aspx

Contact Query:	Name	e-Mail Address	Telephone Number
CMS access and support	IT Help	it@reading.ac.uk	Ext 6262
Requesting a new web presence	Content Team	content@reading.ac.uk	Ext 7164
Copyright and Data Protection	Information and Management Policy Services (IMPS)	copyright@reading.ac.uk	Ext 8981
Visual Identity Guidelines	Design & Print Studio (DPS)	dps@reading.ac.uk	Ext 8085

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