27. Using CMS Direct Edit

Editing a Page

1. Navigate to a live web page using your web browser

2. Scroll down to find the ‘Staff Login’ link on the bottom left

3. Click on ‘Staff Login’

   **Note:** if the ‘Staff Login’ link is not visible, the page you are viewing is not editable via direct edit – please edit it in the usual way via T4 SiteManager.

4. If you have not recently logged into the CMS you will see the log in screen - log in as usual.
5. Once logged in you will see the direct edit view of your chosen page. This looks like the normal page but it has an extra TerminalFOUR bar down the left of the screen, and editable areas of the page will have a dashed line around them. If you have permission to edit the page you will get a number of buttons appearing down the TerminalFOUR bar (if not you’ll just get the Sitemap button, and a message will show on screen to tell you that you can’t edit the page).

6. Put your mouse over one of the editable areas so that the menu appears:

7. Click the edit button to make changes to the content
Important Note

You may notice that if you put your mouse over certain areas of text a grey background will highlight the area, and if you click here, an editing menu will appear at the top of the screen. This is, theoretically, a more direct form of direct edit, but it has flaws, which mean that we wouldn’t recommend that you use it. Please stick to the methods described below until this is updated.

8. The editor will appear:

9. Make your changes and click Save changes to finish

10. A green confirmation message will appear at the bottom of the screen:

11. You will now be able to see the changes immediately in a preview of the page:
12. If you need to check that links are working correctly, click on the Edit mode switch in the TerminalFOUR bar on the left. This will allow you to click on links to check they are working correctly.

Moderator Only:

13. If you are happy with your changes, put your mouse into the editing area and you will see that there is now an additional Approve button (tick) visible in the menu, and there is a Pending flag on the right hand side:

14. Click the Approve button. A window will appear for you to confirm:
15. Click Approve content.

16. A green confirmation message will appear at the bottom of the screen:

17. The Approve button (tick) is removed, and you will see an Approved flag on the right hand side:

18. Your edits will go live at the next scheduled publish & transfer.

**Welsh**

19. To edit the Welsh side of the page, click on the CYMRAEG link within the preview of the. You’ll now see the preview of the Welsh version of the page. Edit the content in the same way as you did on the English side.

**Logout**

20. When you have finished editing, click Exit direct edit at the bottom of the TerminalFOUR bar on the left of the screen.
Options in the TerminalFOUR Bar

Clicking on any button opens the relevant information. If you click on the button again, the information will be removed.

**Add page (Moderator only)** allows you to create a new page as a sub-page (sub-section) of the one you are looking at. You will be asked to name the new page, then the new page will be created.

![Create new page](image)

**Sitemap** allows you to use the Site Structure list to find the section you wish to edit. It will then be opened in Direct Edit view.

![Sitemap](image)
Page settings *(Moderator only)* allows you to make changes to the section details via Direct Edit. You can change the name of the section or the Output URI under the General tab. Click Save changes at the bottom of the panel to save your changes. Please do not attempt to edit any of the other tabs.

Approval queue *(Moderator only)* - allows you to access all of the content that is awaiting approval in sections that you have permission to edit in. You can tick multiple items to approve them in bulk by clicking on the 'Approve selected content' button.
Analytics - not currently in use.

Preview - allows you to preview the page without the TerminalFOUR bar being visible. This opens in a new tab so you can return to Direct Edit in your previous tab.

Edit Mode switch - allows you to switch between edit mode and preview without leaving the Direct Edit tab - the TerminalFOUR bar remains visible.

Exit direct edit - allows you to exit direct edit. You will be given the option to Log out or switch to the standard CMS interface, as well as being reminded to make sure you’ve saved your changes first:
NOTES

What you can and can’t do with Direct Edit

Tasks that can be carried out via Direct Edit:

- Modify text on a normal page
- Add new content to a normal page
- Delete content on a normal page
- Rename a page (section) (Moderator only)
- Add a new sub-section (Moderator only)
- Approve content visible on the page (Moderator only)
- Approve other content (Moderator only)
- View Site Structure
- Reorder editable pieces of content within a page

Tasks that cannot be carried out via Direct Edit:

- Modify text on a non-normal page (e.g. a department homepage)
- Add new content to a non-normal page
- Modify certain types of content (e.g. Page Intro)
- Give a new sub-section an Output URI (unless you edit it via Page settings after creating it)
- View content history and set new active version
- Duplicate a section
- Mirror or duplicate content