

# CMS Training – Remote

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## Introduction

In order to learn how to use the CMS remotely, please read through this document and follow through with the exercises (from the separate sheet) as noted. When you have finished I will need to check your work in the CMS and I will also need you to email confirmation that you have read and understood this document. If there are any areas you are not sure of, please contact me first.

## The CMS

Our CMS is made by a company called Terminal Four (or T4). The purpose of having a CMS is to allow us to separate content from the structure and style of the site. It allows users in departments to be the content experts, and there is no need to learn how to write html.

We recommend that you use the Mozilla Firefox browser to access the CMS.

## Exercises & Notes to Remember

It's useful to make sure you prepare any additional info before starting to create your page – so always think about whether the page will need an image or a PDF etc.

The page we are going to make is going to include an image– so we need to prepare this first. The image needs to be in the CMS's media library so that we can use it in a page. We'll upload the image into the Media library and once it's uploaded we'll create a new 'variant' which is smaller than the original image. The variant is stored with the original image and we'll need to make sure to use the right one.

Work through **exercise 1**.

Note that PDFs are uploaded in the same way, but we don't usually have PDFs on training machines so we don't usually upload a PDF. The only difference is that you must have a description for PDFs as it is used as the link text. If you have a PDF available please complete the additional part of exercise 1 (1D in the box at the end of the exercise).

*Stop and check you understood and everything works as you'd expect*

Your user level doesn't allow you to create a brand new page from scratch but it does allow you to add content to a section that has been created for you. You have an empty section ready for you to work in. The Section is the skeleton of the page, and the content is added to it.

So let's add some content to the section to turn it into a proper page. All pages need to have some text – that's the most important thing obviously, but there are also other pieces of content all pages should have. We ask that all pages on the main university site have the main text, plus contact details and metadata.

Contact details are there so that if a user has a problem or a question there is always someone to contact about the page. Metadata is used behind the scenes – it contains keywords that can be used by search engines.

We'll start with the main text – this is where we'll spend most of our time, looking at how the editor works and how we add the common types of things to a page – text, links, tables, images and PDF files.

First let's add our new piece of content to hold the main text, and do some basic text and formatting to start with

Work through **exercise 2A**.

**Notes:**

Remember that the **Title** should be the same as the name of the Section so that it's clear to users where they are. The Title should always be in title case.

When previewing the new section we may need to tell Firefox to allow this 'popup'. Once that's done once it shouldn't ask again.

Keep the preview tab open for later.

*Stop and check you understood and everything works as you'd expect*

Now we're going to add more things to our page.

Tables are often used around the site so you may find yourself needing to add one.

Remember that tables should only be used for data. So don't use them to have e.g. an image on the left and some text on the right. It's frowned upon and it makes life difficult for people using screen readers etc. If you're not sure if you should be using a table, think about headers – can you find sensible headers for the content you're thinking of putting in the table – if not it's probably not suitable for a table.

Things like lists of staff names and numbers is good data for a table.

All tables must have at least one header – it can be in the first row, or the first row **and** the first column. If it is a timetable for example, you would need both.

Work through **exercise 2B**.

**Notes:**

Don't worry that the table looks tiny – it will grow as you type into it – try not to be tempted to drag it wider.

View your section preview.

*Stop and check you understood and everything works as you'd expect*

Next is links. Links are important to allow users to move around your site or find information that they need. You can use links to help users move from one page to another within your site - you can guide them through the pages. Or you can just provide links to other pages where they will find useful information either inside or outside the university.

We have 2 types of links in the CMS. We usually call them internal and external links although it's not quite that black and white. Internal links are links to other sections within the CMS. External links are more 'normal' links to a web address that you type or paste in – it could be a university page that's not in the CMS – e.g. Primo or it could be a page outside of the site.

Internal (CMS) links should be used as much as possible as they are less prone to break. The link is to a specific section so even if it moved or changed its name the link will still work.

Before you make any kind of link you need to think about the text that the user is going to click on. It needs to make sense if it was seen on its own - it needs to be 'friendly'. Things like 'Click here' or 'More information' don't really say what you're going to get if you click on them. For a sighted user you may be able to understand where the link is going because of the text around it. However, screenreader users can set their screenreader to read out all links, so they don't get the text around them and 'click here', 'click here', 'click here' wouldn't make any sense. It's also useful for sighted users who skim read a page looking for a link they want to click on.

So first we'll think of 2 places to link to and decide on the text to use. I'm going for Open Days for my internal link and BBC for my external link.

Work through **exercise 2C**

**Notes:**

When choosing a section to link to in an internal link, be careful not to click on the name of the section while browsing through the site structure – only click on the + signs to expand sections and look inside them.

For external links make sure to include the http:// or https:// part of the web address. The CMS may try to help you if your web address begins with www, and add the http:// for you, but not all web addresses begin this way so you shouldn't rely on the CMS to fix up your link.

View your section preview.

Note you don't have to keep on saving and previewing all the time when doing a normal page in your department. We're just doing it now so we can see how the page is developing. Normally just make sure you've previewed the page at least once before approving it, so you can be sure it looks ok and all links are working correctly.

*Stop and check you understood and everything works as you'd expect*

Now we're ready to insert that image we prepared earlier. We need to remember to choose the variant as that is a more sensible size to fit in our page.

When inserting an image we need to be aware of the default position of images, which is over on the right. When you insert an image in the CMS editor it will just sit there with the text, but you need to remember it will actually be over on the right in the preview. So you're looking for a vertical "anchor point" to place your mouse, knowing that the image will actually slide over to the right. (You can change the position if required)

Work through **exercise 2D**.

**Note**

Alt text depends on context to some extent e.g. if the page is just using Penguins as a pretty picture to brighten the page just using 'photo of penguins' would be fine, but if the page was actually about different species you might need to be more specific e.g. 'photo of emperor penguins'.

View your section preview.

*Stop and check you understood and everything works as you'd expect*

We're also going to insert a PDF into our page. We may not have uploaded one today, but there are some sample ones in the CMS we can use.

Work through **exercise 2E**.

**Note**

Remember to check that the PDF has a description as this will be used as the link text

Note that while PDFs are really useful we should aim to put most of our content into actual web pages as they are more accessible than PDFs. However if the user is likely to be printing out the information or saving it for later, e.g. an application form, or a research paper, a PDF may be the best place for the content.

View your section preview.

*Stop and check you understood and everything works as you'd expect*

So we have the page looking beautiful but we're missing a couple of things I mentioned earlier that all pages in the main university should have. Contact details and metadata. Now we could just create them from scratch like we just did with the main text, but to save effort we can also 'borrow' them from elsewhere.

There are 2 types of 'borrowing'. Mirroring which creates an identical linked copy and duplicating which is more like copy & paste.

We could use mirroring when creating a new page in a department – we could find an existing page with the department contact details on it, and mirror that content into the new page. The useful thing about mirroring is that if something changes you only have to update one of those mirrored items and they'll all update.

We could use duplicating for metadata. At the top level of your website there should be general metadata with slightly vague keywords about the department / section. Once you get to a deeper level in the website you'll want more specific keywords, but those general ones should also be there. So if you duplicate in metadata from the top level you get all those general keywords and can then add your additional ones for your current page.

We need to borrow some content from your main page – the one with your name on it. Imagine that this is the 'Department of You' and we want to borrow the contact details and metadata from the 'department' homepage.

Work through **exercise 3A**.

#### Notes

Notice the symbol that shows that the item has already been mirrored. If you edited this piece of content, it would change the content in all the locations it is mirrored into.

When mirroring you reach a page that looks like the site structure, but see the black bar at the top which says 'Mirror Content. Choose Destination' – just click on the section where you want to put the content.

Work through **exercise 3B**.

#### Notes

When duplicating you reach a page that looks like the site structure, but see the black bar at the top which says 'Duplicate Content. Choose Destination' – just click on the section where you want to put the content.

View your section preview – you should now see contact details at the bottom of the page.

*Stop and check you understood and everything works as you'd expect*

So now we have a page which has all of the things we say it should have – it has text on the page, contact details and metadata behind the scenes. So what is it missing? .... Welsh. (This applies for most pages across the main university site with a few exceptions. If you are working outside the main university site, be sure to check what your policy is regarding Welsh.)

The CMS knows that we are a bilingual institution so when we create something on the English side, it creates a skeleton version of that on the Welsh side. When the English About Me section was created, the CMS created a skeleton Welsh section. Then we created new *content* in English so again there will be a skeleton version of that. Because the CMS doesn't know what to call these, it names them 'Not translated'. If you need to know which one is which (if there are multiple 'Not translated' sections/content) you can put your mouse over them and you'll see what they are called in English.

The Welsh side has already been named for you in Welsh, so now we need to get the Welsh versions of the content ready. We should always remember not to start editing the Welsh version in the CMS until we have our translation ready.

How do you get that translation? If you speak Welsh yourself and are confident in written Welsh, you could of course translate it yourself. However not all Welsh speakers feel confident in their written Welsh, and English speakers can't translate, so you may need to either find a helpful colleague who can do it, or send your text to the translation unit. When sending text to the Translation Unit it's best to put it in a Word document for them (as that's how they'll be working) and also try and set some kind of deadline so that they can prioritize it in their pile of things to do.

Once you have that translation back you can get started putting the Welsh version of the page together.

Work through **exercise 4A**.

#### **Notes**

There are 3 items of content in the section because when you mirror or duplicate it brings both languages if they are available. The content we mirrored and duplicated had Welsh versions already in place so they came too.

We need to recreate what we had on the English side, so we need to put in the translated text as well as the image, links, table and PDF. For the links – we'd need to consider if there was a Welsh version of the page we linked to. For the PDF we'd have to find the Welsh version of the PDF if it is available.

For today it's acceptable to just type something like "Welsh text will be here" if you are not able to translate the text yourself, but of course, remember that we'd never do that on a real page.

Now, we have our page all complete in both languages (we'll pretend that we've done the Welsh properly – obviously we'd never do that for a real page – just in this training area).

*Stop and check you understood and everything works as you'd expect*

We have one step left in the process. At the moment everything we've done is just going to stay in the CMS. It's safe, but it's not going to get on our website until it is approved. So you would now need to ask a member of your team/department who has the right permissions to approve your work.

Once your work is approved it will go live during the website update process. This begins with the 'publish'. This is an automated process that runs every hour day and night at 10 past the hour (on the main university site). This publishes out all approved content onto a 'staging server' called cmspreview.aber.ac.uk (or mupreview.aber.ac.uk for our aber.mu site). Then, 4 times a day, a member of the Web Team runs a manual process we call a 'transfer' which copies everything from the staging server onto the live site. This is done manually so we can have a quick check of cmspreview to make sure that nothing has gone wrong. If it has we'll delay the transfer until it's sorted out – this avoids the live site getting broken.

### Final Steps

Please email me at [sfs@aber.ac.uk](mailto:sfs@aber.ac.uk) to confirm that you have read and understood this document and have completed the exercises. I will then check your work in the CMS to see that you have understood how to use the system. If this is all ok we'll then proceed to update your permissions.