# TABLE OF CONTENTS

## ACKNOWLEDGMENTS

OIT would like to extend our gratitude to the five pilot websites: Finance, Police, Graduate Studies, Financial Aid and Finance for enduring the trials and tribulations associated with beta testing a new platform like this. We are especially indebted to the Finance Department for creating the first WebCMS manual that this manual is based upon. While many things will change throughout the lifetime of this document, the groundwork of effective web design and development will remain. Most of the examples in this document give examples from the Finance Department's internal practices – we kept those references in tact whenever it made sense to do so.

# INTRODUCTION

Ohio University uses a content management system (CMS) to maintain information across its web pages. A CMS provides users the ability to maintain and create content for their pages without advanced web programming knowledge. The WebCMS provides a unified structure to simplify the process of creating and maintaining webpages across Ohio University and provide visitors to ohio.edu a consistent and meaningful experience.

OHIO's WebCMS is Drupal and there are just a few key concepts for content contributors to understand that will help you navigate your way around the interface.

Drupal is unique in that it takes a **modular** approach to content management. Normally when we look at a webpage, we see it as one thing – a webpage. But there is no such thing as a "page" in Drupal. There are only content items that are stored in a database. Try to imagine seeing boxes around functional areas on a web page. One of those boxes might be left side navigation, one might be main content, one might be the information at the bottom of the page that never changes, one might be a news or twitter feed on the side that updates constantly. Drupal separates these boxes and lets you manage them independently – and although that can be complicated at times, it's really pretty amazing.
Working in Drupal means that we'll be adopting a new language – but fortunately, it won't be nearly as challenging as learning French! In fact, there are only a couple of terms you need to help you safely navigate Drupal as a content contributor.
The first new term is "node"
All content on a Drupal website is stored and treated as "nodes" and this is an important concept to understand. A node can be any type of content on the site, and in our case, we have 5 basic content types in Drupal:

- the Basic Page content type
- the Article content type
- the Profile content type
- the FAQ content type

· And the Card content type (which is currently in development as of this recording)
We've covered details about each of these content types in other videos in this series, so be sure to watch those to better understand each one.
The next important concept is "Groups". We use Groups to divide subsites under the URL ohio.edu. For instance, if you want to work on a page in Finance, you would click the link on your main page called

"Finance" -- Finance is a group in Drupal. "Police" is a group in Drupal, "Financial-Aid" is a group in Drupal and so on.

Now that you have a basic understanding of key concepts, let’s take a look at some Web best practices.

# WEBSITE BEST PRACTICES

## USE HEADINGS

Headings allows users to scan a page and see the structure of the content. When users look at a page or a document, they often scan through the content in chunks, reading a heading and the first few lines of text to see if the section has the information they need. Web editors should utilize this information to help focus a reader's attention. Use heading levels as section titles. They should break up the content and draw a user's focus to information within that section. This can be thought of as similar to a table of contents or an outline. For example, consider the following outline:

- Healthy Living
    - Fitness
        - Cardiovascular exercise
        - Strength training
    - Nutrition
        - Proteins
        - Carbohydrates
        - Fats

In the above example, the top-most category is Healthy Living. This is the main topic and is styled as Heading one (H1).

Healthy Living has two main categories: Fitness and Nutrition. Each of these would be styled as a Heading two (h2)

The rest of the categories in this example would be styled as Heading 3 (H3). This example could be expanded further. For instance, carbohydrates could be broken down into food groups. Heading 4 (H4) items then could be fruits, vegetables, grains, etc.

Ohio University's style guide includes styling for six levels of headings within the WebCMS Rich Text Editor (RTE). Heading 1 (H1) is used within the header of the site to denote the department or office title. There should only ever be one H1 on any given webpage. Heading 2 is used for the specific page title. This leaves headings 3 through 6 for the content within the page using the RTE "headings" dropdown list.

## HYPERLINK TEXT

The ability to create hyperlinks between documents and webpages on the World Wide Web was one of the driving forces in creating the web. Hyperlinks help visitors quickly get the information they are looking for, and often discover new ideas and possibilities. Hyperlinks are easy to create, but if you create them strategically and carefully, you can create an outstanding experience for your website visitors.

One of the easiest ways to improve usability in your website is to follow recommendations to improve accessibility for users who use screen readers to understand your website. Typically, all users scan a page by looking for both headers and the words inside hyperlinks to help them see if the page contains information they are looking for, so when you optimize your page for people who use screen readers, everyone benefits.

People can also use a keyboard to jump from link to link and let the screen reader tell them what the link is by reading the text within the hyperlink. Imagine what might happen if the words inside all of your hyperlinks were "read more" or "click here" – not very useful.

Here are a few guidelines in mind when creating links:

1. Do not use "link" in the text
   a) Screen readers will tell the user that the text is a hyperlink. Adding "link" in the text is redundant.
   b) Hyperlink text appears differently from normal text. It is often a different color, underlined, and has attributes that change when the mouse is hovered over the text. These all indicate to the user that it is a link. Be sure not to "design" that difference out.
2. Incorporate key words that people are searching for in your hyperlinks. This will not only help all visitors find the content they are looking for, but will also help with search engine optimization.
   a) Instead of writing "Hyperlinks can improve your content strategy. Learn more." Write "Improve your content strategy by creating effective hyperlinks."
3. Avoid using the URL itself as the link text
   a) National Geographic uses www.nationalgeographic.com as their website. When a screen reader tries to read a URL, such as www.nationalgeographic.com, it cannot tell where the words should separate, so it will read the URL letter-by-letter. Instead, use keywords within the text to link to other pages. In this example, "National Geographic" could be used to link to their website.
   b) Note: There are instances where the URL may be handy. This guide, for instance, points out how-to information about using URLs and describes differences among the multiple options when using them. URLs can be used to emphasize recent changes in a URL's text or if the page or document is likely to be printed.
4. Be cautious when linking to a document
   a) Some browsers automatically download a document as soon as its link is clicked. It is your responsibility to **explicitly tell visitors** that a link leads to a document and what exactly it will download when clicked. This can easily be accomplished by adding the file type in parentheses following the link keywords. For instance, if linking to a financial report in PDF format, you could have – "2016 Annual Report (PDF)" as the hyperlink text.
5. E-mail links can be handled in two ways
   a) If a phrase gives the user enough context to know the linked text leads to an e-mail, the text can be linked. For example, "E-mail Finance Customer Care" or "contact Finance Customer

Care via e-mail." In these cases, the entire phrase should be used as the hyperlink text.

b) If context cannot be easily given within the sentence, it is acceptable to use the email address within the sentence and use it as the hyperlink text.

## DOCUMENT NAMING

Within a website, documents are often linked as additional resources for the user. Behind-the-scenes, these documents live within the website's subdirectories, or folders. This means they work similarly to files stored within folders on a user's computer. The naming conventions of your site's files should follow the same naming conventions as URLs:

1. Do not use spaces or underscores within your document names. All characters should be letters, numbers, and hyphens.
2. Do not include version numbers within the file name. Web directories should remain as small as possible. If newer versions are needed, they should *replace* the old version, not be added as a second file with a new name. **While it is fine to save a copy to your computer with a version number, the file that you upload for the website should not include this version number within the document name**.
3. When you update a document, save the new version per office policy to the correct location. Save it *again* in the website files folder, *overwriting the old version* of the document so that the previous name is maintained. Learn more about how to do this in the Folder for Web Files section.
4. Do not include dates in the name of the document. For instance, Budget packet tools currently have the fiscal year in their file name (e.g.: FY18-Budget-Manual.pdf). Each year, a new budget packet will be uploaded and the old one will no longer be used by those visiting the site. In this case, the only necessary information in the file name is the "Budget-Manual.pdf" information. Removing the year from the file name allows web editors to overwrite this file with a new version without breaking the file path because the date would change.
5. If necessary, add the latest version date to the contents of the file, such as in the document header or footer.

---

**Note:** Some files will need to have a date within the file name. For Financial Reports or the Budget Book, for instance, multiple years of these files will be available on the web. In order to distinguish the files from one another, they should contain the date information within the file name (e.g,: "budget-book-fy15" or "ohio-university-report-2010").

---

## FOLDER FOR WEB FILES

To keep track of your site's files and their names, create a dedicated folder for your uploaded documents. Continue to update and save files to the recommended locations based on office policy. However, when a web document is updated, it will also be saved within this web folder.

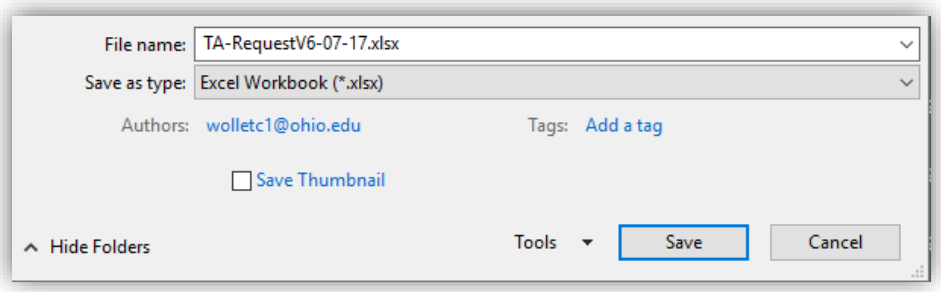
Within this folder, all files will be named based on the naming conventions described within this document. Ensure these names are maintained by overwriting the file when you save your new version. To overwrite the file properly:

1. Open the document you want to edit. For instance, the Travel Advance Request.
2. When you go to save the finished document, choose **Save As**.

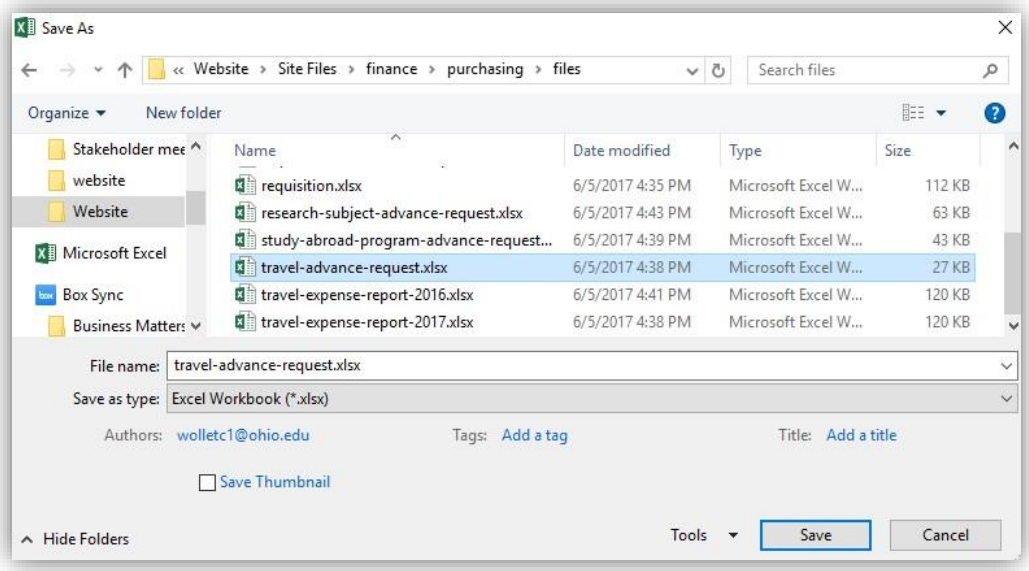
---

**Note:** Some applications will immediately open the dialog box pictured below. Others may require you to select "Browse" and then navigate to the desired save location.

---



4. Change the file name to follow your office's file naming protocol. Then click **Save**.
5. Repeat step 2.
6. This time, when the dialog box opens, navigate to the folder with all of your site's files.




7. Click on the file name of the item you want to overwrite. The dialog box will update the file name field to match the old version. Click **Save**.

---

**Note:** A new dialog box may appear asking if you want to overwrite/replace the current file.

Make sure you have the option selected to overwrite/replace and approve the change.

---

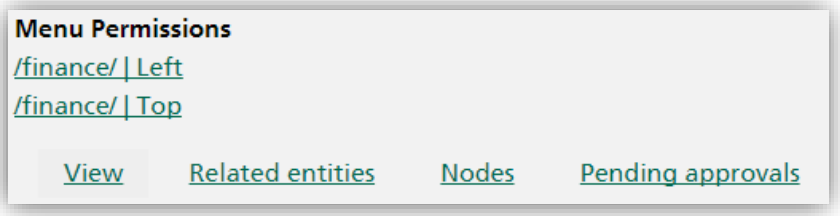
This web folder will be the one used to upload documents to the site. Examples of how to add files to your site can be found in later sections of this guide.

# GETTING STARTED

## LOGGING IN TO THE CMS

1. In the web browser of your choice, navigate to https://webcms.ohio.edu/web-login.
2. The Web CMS utilizes the University's single sign-on (SSO) system. Log into the CMS using your OHIO ID and password.
3. Once logged into the CMS, you will see a black menu bar along the top of the screen. The menu bar will allow you to view and edit your profile as well as see the groups you may access.


4. Users should see a page displaying information about their group status. This will be a listing of the groups, or subsites, they can edit. Clicking on one of the groups will take the user to the content listing for that group.
5. Once on the Group page, the following menu will be available:




Out of this menu, the most used options will be:

- **Menu | Left:** This will allow users to edit the pages listed within the left menu within each group.

*Note: Each group has a separate left menu. In other words, the Purchasing group will have a different left menu than the Accounting group.*

- **Menu | Top:** This will allow users to edit the list of pages within the top menu in green appearing on every page in Your website.

*Note: The top menu is shared among all groups within the Your website site. It can only be edited from the Finance group.*

- **Nodes:** This lists all content types associated with the Group. From here, editors will be able to view and edit specific content.

**Pending approvals:** This lists all edits an editor has made and submitted for review. See Approving Content for more information about the approval process.

Content editing will be driven from the “Nodes table.” Clicking on **Nodes** in the tabbed menu shown above will allow you to see a listing of all pieces of content, or nodes, within your site. The elements that can be added to a site are known as Content Types. Each possible content type is described in the next section.

## CONTENT TYPES

Pages and other special elements that can be added to your site are known as "Content Types." Not every group will utilize all the content types. The content types listed here represent what is available to all groups at the basic service level agreement for OIT.

Available content types within the new Web CMS are:

- **Articles:** News articles that can be used to populate News Archives and News Feeds.
- **Basic Page:** The standard page containing text and images.
- **Card:** Used for small pieces of content that will be reused on multiple pages. As of now, this content type is still in development. OIT will have training available once this content type is released.
- **FAQ:** Allows input of questions and answers. When viewed as a page, users will see the questions and the answers will appear once question text is clicked.
- **Profile:** Staff profile page that will appear within Staff listing views.

  More information about the available fields for each content type is available in the sections below.

### *ARTICLE*

- **Title:** This is a required field. The title will be displayed at the top of the article and be used in URL creation. As such, please keep all titles to alphanumeric characters and hyphens. While special characters can be used, they require encoding within a URL to work correctly and should be used only when necessary.
- Author
- **Publication Date:** This is a required field. If left to the default value, the article will publish as soon as the created content is saved. If the article should publish as a specific time and date, these values should be edited to reflect that.
- **Expiration Date:** If articles should exist indefinitely, these fields should remain blank. Only use the expiration date fields if an article should no longer appear within a news feed or news archive after a certain date.
- **Teaser Image:** If this view is set for your website, go ahead and upload a small image. This will be displayed in the listing of articles with the article abstract.
- **Image:** If an image is uploaded here, it will display at the top of the news article when viewing it online.
- **Image Caption:** This will display text beneath your image.
- **Body:** This is the main content of your story. You can type your content in directly to the CK editor or copy and paste from another source. For assistance utilizing the editor features, see

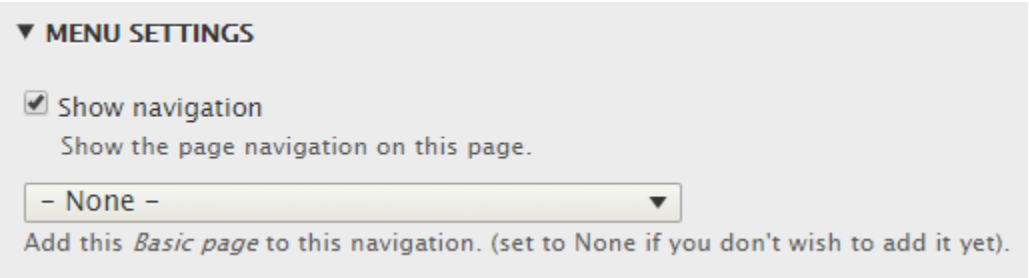
Text Editor Interface.

- **Tags:** Choosing a tag will send this story to the section of your website designed to receive this story. More than one tag may be selected by holding the **Ctrl** key and clicking on desired tags.
- **Compass Terms:** This should remain blank as Compass Articles will be handled at a later date.
- **Abstract:** You can leave this field blank and Drupal will choose the first 155 characters from your story, or you can fill this in and create a short reason for people to click on this story and read it.
- **Article Link Text:** Do not leave this in the default "Read More" state. Use key words here to describe where your visitors are going, and to assist those using screen readers who may be navigating this page using links.
- In the right column, open the **Display Settings** tab. Set the **View mode** to **Full content**.
- Choose a "Save Option"

### *Basic Page*

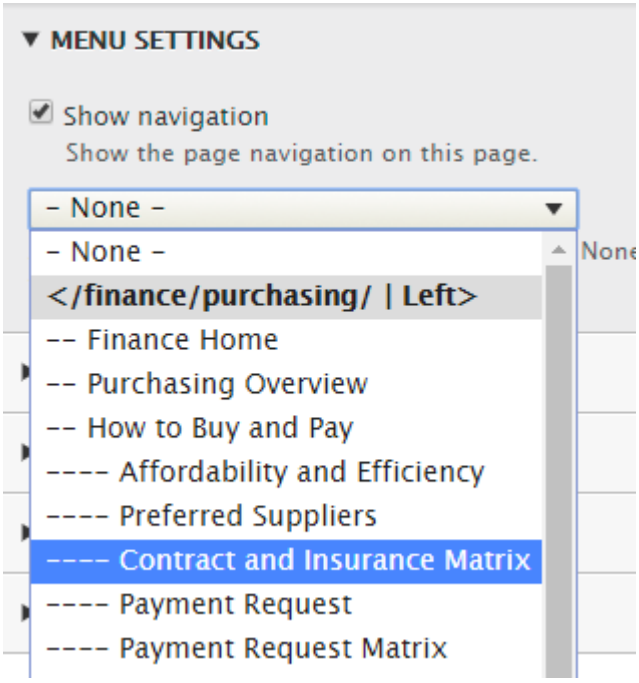
To create a basic page, click on "Nodes" and you'll see a list of all available nodes in your group. Choose "Create Node" then choose "Basic Page" in the list of content types.

- **Title:** This is a required field. The title will be displayed at the top of the main content area and be used to generate the URL. Use care when creating page titles and be sure the title represents the content and uses key words. Keep them short and to the point. While special characters can be used, they require encoding within a URL to work correctly and should be used only when necessary.
- **Body:** This is where you add the main content for this page. For assistance utilizing the editor features, see Text Editor Interface.
- **Menu Settings:** It is possible to add the page you are working on to the navigation from edit version of the page. It is also common to make those changes in the navigation editing environment as well. Either way, **it is recommended that you select a menu parent even if this node is not meant to show within a menu**.
    - The node's position within the menu dictates what its final URL will be when published. This allows quick and easy reorganization of URLs. Keep in mind that the URL will update automatically within menus, but does not automatically update if linked to within content.
        1) On the right side of the edit page, within the Advanced Options block, is an open panel labeled "Menu Settings". Based upon previous selections you will see different options available.




2) **Show Navigation:** This will enable (checked) or disable (unchecked) any left navigation from appearing on this page. Top navigations are not affected by this option. Most of the time, you will want this box checked to show navigation on your node.

3) Below the "Show navigation" checkbox is a drop down that contains all the navigations this page could be added to or display. All unique navigation collections are labeled with their base URLs, either "Left" for left navigations or "Top" for top navigations, and gray backgrounds

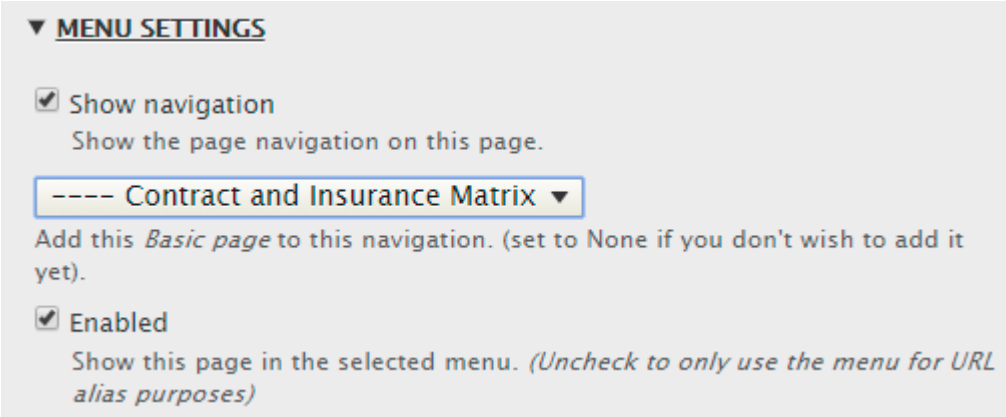



4) The item you select will update the node's final URL when saved. **Examples:**

   Selecting "**</finance/purchasing/ | Left>**" as the parent will place this node within the top level of that navigation and the resulting URL will be /finance/purchasing/page-name

   Selecting "**---- Contract and Insurance Matrix**" (whose URL is /finance/purchasing/contract-and-insurance-matrix) will place this node as a child of the selected and the resulting URL will be /finance/purchasing/contract-and-insurance-matrix/page-name

5) Once a parent item has be selected, you will be presented with another option for enabling this node within the navigation:




6) Checking "Enabled" will show this node on the navigation. Unchecking will not display this node, but will still use the parent you selected when updating its URL path. You can enable and disable nodes, later, by either visiting the node directly, checking "Enabled", and saving or by going to the menu and checking "Enabled" next to the disabled node. **Be sure to save the menu after doing this or the change will not stick.**

Selecting a navigation should only need to be done once. If you ever need to reselect a navigation parent on a previously published node, please contact Web Services because this should never happen.

- **Display Settings:** In the right column, the **Display Settings** tab allows the choice of number of columns for the page. Most websites have been configured to display either **2** or **3** columns. Your website's design will determine if the second column should be set to the left or right.
  - If you choose the option for **3** columns for the page, an additional option will appear for adding content to the page:
  - **Basic Right Sidebar Item:** This will allow adding a box for resources or a link to another department/external site. To use, click the arrow to open the dropdown and choose **Add Content Blurb (Text Editor)**. This will add another text editor where the content for the right sidebar should be added.
- **Finally**: Choose a "Save Option"

## *FAQ (Frequently Asked Questions)*

- **Category:** This acts as the title for the page if an FAQ is on its own page. If multiple FAQs are placed on a page, this will act as the section header. This should be descriptive of the type of FAQ (e.g., BobcatBUY FAQs, Concur FAQs, PCard FAQs, etc.)
- **Body:** Text placed here will show above the questions and answers. Use this to describe the

category or give instructions to the user.

- *Questions Section*
  - **Question:** Text placed here will be displayed when the page loads. This is where you type in questions that reoccur from your key audiences.
  - **Answer:** Answer text will be hidden when the page loads. Users will have to click on the corresponding question text to see the answer. Answers can be formatted using the Text Editor Interface.
- **Add Question and Answer:** Use this button to add additional Question and Answer sections. One will be added at a time. You can click and drag the questions and answers to the desired order.

In the right column, the **Display Settings** tab allows the choice for the styling of the FAQ. In order to have the FAQ act as its own page, choose either **Default** or **Blocks**. A preview of each will appear below the dropdown. Since the FAQ will then act as a page, choose the number of columns (**2** or **3** should be chosen). If two columns are chosen, set **Second Column Position** to **Left**.

- Choose a "Save Option"

### *PROFILE*

- **Display Name:** This is a required field and will be the name that appears within the staff listing.
- *First Name*
- *Last Name*
- **Image**: Upload images according to your website's design.
- **Title**: Enter the staff member's position at the University
- **Department**: Select the office most associated with the staff member. This will tell the Web CMS *where* to show the staff member in staff listings so be sure to select the correct department.
- **OHIO ID**: Input the staff member's OHIO ID. This is the first portion of their OHIO e-mail address. For instance, if their e-mail is lastname@ohio.edu, then their OHIO ID would be **lastname**.
- **Email:** Input the staff member's OHIO e-mail address.
- **Office Phone:** Enter up to two work numbers for the staff member.
- *Website*
- *Office Address*
- **Bio:** This is an optional field. If text is entered, it will appear when a staff member's name is clicked within a staff listing page.
- **Link to Full Profile:** If a Bio is entered, check this box to create a link to the bio from the staff listing page. If no Bio is entered, leave this box unchecked.
- **Sort Ranking:** This determines the order in which profiles appear in a listing of profiles. The higher the number, the higher in the list the profile will appear. For example, a department head should have a ranking of 9 in order to appear at the top of the list. If you are unsure about this, leave it at the default value of 5.
- Choose a "Save Option"

## SAVE OPTIONS

After filling in the appropriate fields for a content type, editors will notice a blue drop down menu at the bottom of the page. Options within this drop down include:

- **Save and Create New Draft:** Creates an unpublished draft of the content type. This allows the editor to go back later and finish editing the content before it is marked for review/publication.
- **Save and Request Review:** Creates the content and puts it into the Pending Approvals bucket for Publishers to review.
- **Save and Publish:** Creates the content and immediately makes it live on the web.

- **Save and Archive:** Saves the content but removes it from publication. This is a way to archive a page that you do not want to be publicly-viewed but may use again in the future. Any links to this page should be removed *prior* to archiving the page or the link will appear broken within the site.

---

**Note:** Only **Publishers** will have access to **Save and Publish** and **Save and Archive**. Before using these options, publishers should check with department heads to see if content should go live or be reviewed or archived first.

# Content Changes

## Editing Existing Content

Once logged in and on the group page, click on **Nodes** within the tabbed menu. Editors should now see all currently created content within their group. The drop down menus above the content listing allows editors to filter items based on two categories:

1. Published status
2. (Content) Type

In addition, the content listing is within a sortable table. Editors can click on the column header for **Title**, **Content type**, or **Updated** to sort the listing by that category. This makes it easy to group content types together or to see the most recently updated page.

In general, there are two ways to edit content:

1. Click **Edit node** in the row of the piece of content you want to edit. This will take you directly to the editing window.


2. Click the title of the piece of content you want to edit. Then, while viewing the piece of content, select **Edit** from the task menu at the bottom of the page.


All inputs described in the Content Types section will be available when editing existing content. Editors should update the fields with the new information. After all information has been updated, select the appropriate save option at the bottom of the page.

Some content types require special consideration when editing. Please review the sections below *before* editing to see if one of these content types exist in your area.

## UPDATING/CHANGING NAVIGATION

### *WHAT IS NAVIGATION?*

Navigation is part of Information Architecture and is there to help people find their way around **your** website's content. As such, a lot of care and attention needs to go into creating meaningful categories and naming conventions for your navigation items. In general, navigation items should:

- not take visitors out of your groups
- not link to a document
- use tested key words that will help visitors find information easily
- be short and precise
- use & instead of the word "and"
- represent the organizational structure of your website

## TOP MENU

The top menu is the green bar along the top of every page within the website. This menu contains dropdown links for each of the **main functional areas** within the site.

The goal with this menu is to be a *general* guide to the main areas throughout the site. This menu should **not** be an exhaustive list of all pages within each group. Instead, the items within each dropdown should be pages with generalized information that will help a user decide if they need more information or another page. For example, there are multiple pages containing information surrounding grants accounting. Instead of listing each one in this top menu, editors should list a general page – the main Grants and Contracts Accounting page – and **let the left menu assist users** from there.

The expectation is that the Top Menu should need edited only on rare occasions. Individual pages will likely not need added to this menu, but a new *category* of pages may be beneficial to add. There is a hard limit (which is about 7 items) to the number of navigation items in the top menu. The wording of these categories also must be very short and to the point.

### *TO EDIT THE TOP MENU*:

1. Navigate to your group and click **/your group name/ | Top** from the **Menu Permissions** section
2. Click **Add link** to add a new item to the menu or click **Edit** next to the menu option you want to edit.
3. Enter the desired display text into **Menu link title**
4. **Link:** There are three ways to link to a page:
    - Begin typing the *title* of the page you want users to access from this menu option. The title is the name of the page within the Nodes table and the text displayed at the top of the page when you view it.

- For *internal* pages (those beginning with "ohio.edu"), enter the portion of the URL that follows the ".edu." For example, to link to "https://ohio.edu/finance", just enter "/finance" (without quotes).
- For *external* pages, enter the entire URL into the input box. You should never add an external URL to your navigation, remember, navigation is how people find their way around your website.

5. Ensure the **Enabled** checkbox is checked.
6. **Description** may be left blank. Only use if the **Menu link title** is not descriptive of the content. Which it should be.
7. Ensure the **Show as expanded** checkbox is checked.
8. **Parent Link**: This tells the menu where to place the link. For instance, if you were updating the Finance page, to select an option, open the dropdown and scroll to the options below **</finance/ | Top>**. Usable options would be:
    - Accounting & Reports
    - Budget
    - Purchasing & Payments
    - Travel
    - Systems
    - Capital Projects
    - Treasury
    - Resources
9. **Weight**: This tells the menu how high or low within the list the link will appear. Lower weights appear near the top of the listing and higher weights are near the bottom. Editors may need to adjust the weights of other menu items to position a new link *between* others.

---

**Caution:** The top menu has sizing constraints on it from UCM. Attempting to add additional top level links may result in a broken appearance on the actual pages. Please only add links *within* the already established categories.

---

Once menu items are created, their order and grouping may be edited from the initial **Edit menu** page. This will list all menu options in a drag and drop interface. Editors may then use a mouse to drag items to the desired location.

To delete an item from the menu, use the operations dropdown to change the default **Edit** option to **Delete**.

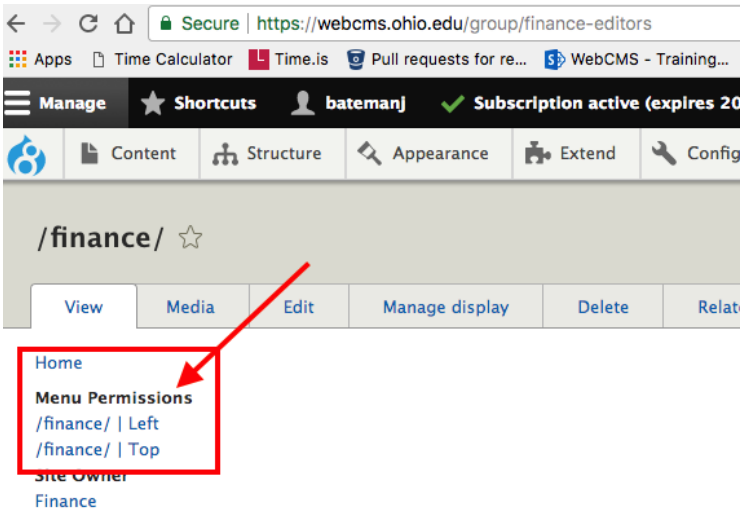
## LEFT MENU

The left menu is along the left sidebar of each group and has the ability to categorize links to pages so that not all are shown at once. Unlike the top menu, this menu should contain *all* the pages within a group. Every published page within the group should be accessible via this menu. So when a new page is created, it should also be added to the left menu upon publication.

### *TO EDIT THE LEFT MENU:*

1. Navigate to the group whose menu needs editing and click **/your website/group-name/ | Left** from the

   **Menu Permissions** section



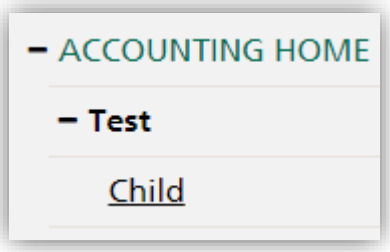

2. Choose the Menu Link you wish to edit and click "edit" under "operation"
3. Enter the desired display text into **Menu link title**
4. **Link:** There are three ways to link to a page:
   - Begin typing the *title* of the page you want users to access from this menu option. The title is the name of the page within the Nodes table and the text displayed at the top of the page when you view it.
   - For *internal* pages (those beginning with "ohio.edu"), enter the portion of the URL

that follows the ".edu." For example, to link to "https://ohio.edu/finance", just enter "/finance".

- For *external* pages, enter the entire URL into the input box. (Please keep in mind that it is not a best practice to link to a webpage outside of your group in any navigation. Navigation is there to help people get around your website. Helpful websites can be listed in a "resources" page on your website.)

**Note:** If you know the menu item will just be a category title (an item that opens to display more options but does not link to a page itself), **enter # into the box**.


5. Ensure the **Enabled** checkbox is checked.
6. **Description** may be left blank. Only use if the **Menu link title** is not descriptive of the content.
7. Ensure the **Show as expanded** checkbox is checked.
8. **Parent Link**: This tells the menu where to place the link and whether it should be an expandable option or not. The left menu allows three levels of nesting:




To define the nesting within the editor interface, editors must define parent/child relationships. In the example above:

- **Test** is the parent of **Child**
- **Accounting Home** is the parent of **Test**
- **</finance/accounting/ | Left>** is the parent of **Accounting Home**

Within the Web CMS, that would look like:

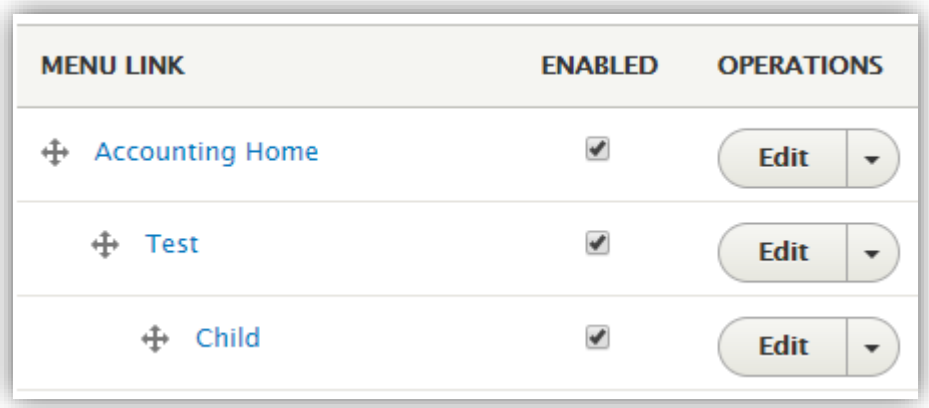
```
</finance/accounting/ | Left>
-- Accounting Home
---- Test
------ Child
```

To select a parent, scroll to the section beginning with **</finance/group-name/ | Left>**. Then select the appropriate option for the item being created.

**Note:** The displayed menu on a page does not allow for a fourth nesting level. Please ensure that categories are created so that only three levels of nesting are being used.

1. **Weight**: This tells the menu how high or low within the list the link will appear. Lower weights appear near the top of the listing and higher weights are near the bottom. Editors may need to adjust the weights of other menu items to position a new link *between* others.

Once menu items are created, their order and grouping may be edited from the initial **Edit menu** page. This will list all menu options in a drag and drop interface. Editors may then use a mouse to drag items to the desired location.




To delete an item from the menu, use the operations dropdown to change the default **Edit** option to **Delete**.

## Right Column Text Boxes

Content boxes in the right column are edited within the Basic Page editor. To update these, navigate to the page containing the box and use the **Edit** button at the bottom of the page. This will take you to the Basic Page view and allow you to edit the content within the **Basic Right Sidebar Item** section.

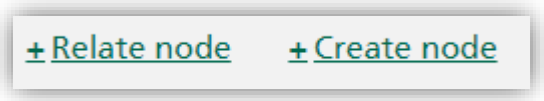
## Staff Listings

The staff listing pages can exist for multiple groups within your website. The listing view itself cannot be changed. To edit information about individual employees:

1. Navigate to the corresponding group page
2. Locate the name of the employee whose information needs edited
3. Click **Edit node** from the Operations column for the row you want to edit
4. Make edits in the necessary fields. Information about the fields is available in the Profile Content Type section.
5. Save the profile

## Creating New Content

From the main Group page, click on **Nodes** within the tabbed menu. Below the table of already created content, a new submenu is available:




In order to create new content, editors should click on **Create node**. This will display a page listing the available content types. Clicking the name of a content type will take editors to the creation page for that type.

Fields available to edit are the same as those described in the appropriate section of the Content Types descriptions.

Once content is entered in the fields, editors should select the appropriate save option from the menu at the bottom of the page.

### *Articles*

News feeds and archives will be driven by the Article content type. Pay special attention to the **Tags**

Section. The tag(s) you choose will determine *where* the article will be located.

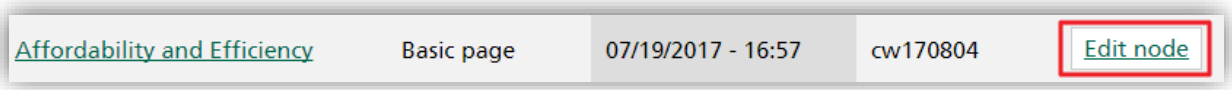
Since the article content type can cross the entire group's site, editors and publishers need to be especially cautious about saving these items. Because this tool is so powerful, we recommend both editors *and* publishers select **Save and Request Review** when creating articles. This ensures that articles are reviewed by at least one other person before being published.

## APPROVING CONTENT

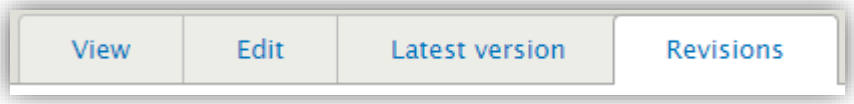
From a group's main page, the **Pending approvals** tab will show which items have unpublished changes. These items may be newly created content types that have never been published on the live site or content already on the site but with new edits that have not yet been published. While both editors and publishers will be able to see items that are pending approval, only publishers will be able to edit and publish them.

The approval process consists of:

1. Once on the **Pending approvals** tab, click **Edit node** next to the item to approve



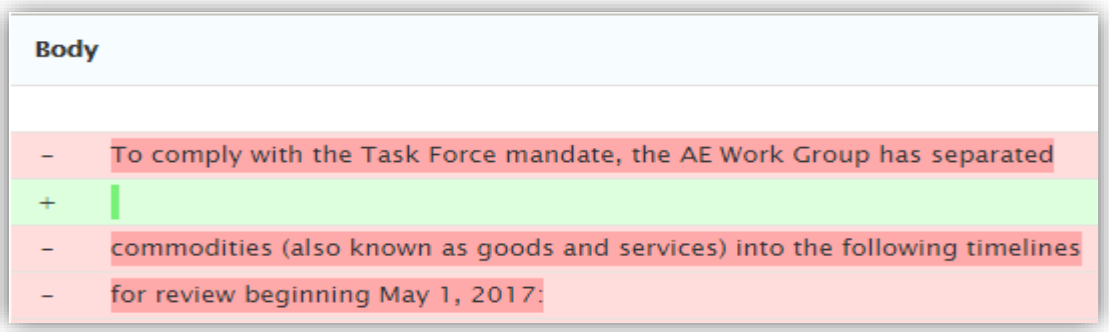

2. To assist with the approval process, publishers may compare the latest changes with what is already on the published page. Click the **Revisions** tab at the top of the page.



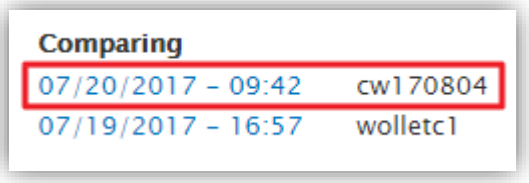

3. Use the radio buttons to select both the ***Current revision*** and the most recent revision


4. Click **Compare selected revisions** at the bottom of the page.

5. The next page allows you to see items that were removed (shown with red text and a minus [-] symbol at the beginning of the line) and which items were added (shown with green text and a plus [+] symbol at the beginning of the line).




6. If the changes are acceptable and should be published, scroll to the top and click on the more recent version of the content.

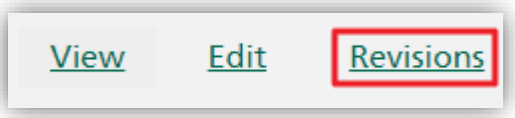



7. Change the Moderate status to **Published** and click **Apply**.

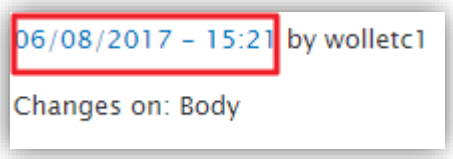
## *Reverting Content*

If a page has been updated incorrectly, publishers are able to revert back to a previous version of the content. To do this:

1. Click on **Revisions** in the bottom menu of a page




2. Similar to the Approving Content process, earlier versions of the content can be compared. In addition, a single previous version may be viewed by clicking on the date at the beginning of the row.



3. Clicking the **Revert** button will revert the published page to that version.

# Text Editor Interface

When editing text within a content type, editors will be able to use a text editor with a toolbar containing common editing options. This toolbar contains numerous options, many similar to those found in other text editors in software like Microsoft Word. Specialized options include:

Remove format – removes formatting from the highlighted text

- If content is pasted using a method other than **Paste as plain text**, this should be used to clean the extra formatting from the pasted content.

Create a Simple Box – Gives a way to style text into columns. Editors can choose number of boxes and columns so that content can be grouped in side-by-side boxes.

Link – creates a hyperlink

- A URL may be entered to link to another page
  - If the desired page is within the Ohio University website, only the portion of the URL *after* .edu needs entered. For example, to link to https://www.ohio.edu/finance, only **/finance** would need entered into the input box.
  - If the page is outside the University website, enter the entire URL, starting with http:// or https://.
- To link to a document, click **Open File Browser**, or use the **File Manager**  button. This will open a file explorer where editors can upload or select the desired document. More information is available in Working with Documents.
  - **Before adding a link to a document, be sure your highlighted text includes a reference to the type of file being linked to (e.g., [PDF] or [Excel]).**

---

**Note:** The Hyperlink Text should be highlighted *prior* to using the **Link** button.

Media – upload and insert images. For more information, see Working with Images.

Video Embed – inserts a video

- Video URLs should be from YouTube or Vimeo
- Leave the default settings (Autoplay should be **unchecked** and Responsive Video should be *checked)*

Paste as plain text **(recommended way to paste text)** – pastes content from the clipboard removing any styles and formatting.

# Working with Documents

Documents within a website function much like a page within a website. Each document is given a URL depending upon which group the file was uploaded into. There are two main storage areas where files can be uploaded: Public storage and Private storage.

Loading a document into Public storage allows it to be accessed by anyone viewing the website. Loading it into Private storage, on the other hand, allows only users with an OHIO ID to access the file. Clicking the URL for a private file will direct users to a login screen before being able to access the file.

## Linking to a New Document

### Public Storage

1. While editing content in the text editor, highlight the desired Hyperlink Text and click on the **Insert file links** icon
2. Navigate to the desired folder where the document will be housed
   - Pick the folder that directly relates to the functional use of the document. For instance, system training information should go in **systems** while budget tools should go in **budget**.

- Select the **files** folder within the group folder selected above

3. Click the **Upload** button along the top of the window
4. Click **Add file** to bring up a file explorer
5. Locate the file on your computer and click **Open**

---

**Note:** The File Manager also supports drag and drop functionality. After clicking **Upload**, users can drag files from their computer to the green box in the File Manager to load them to the selected folder.

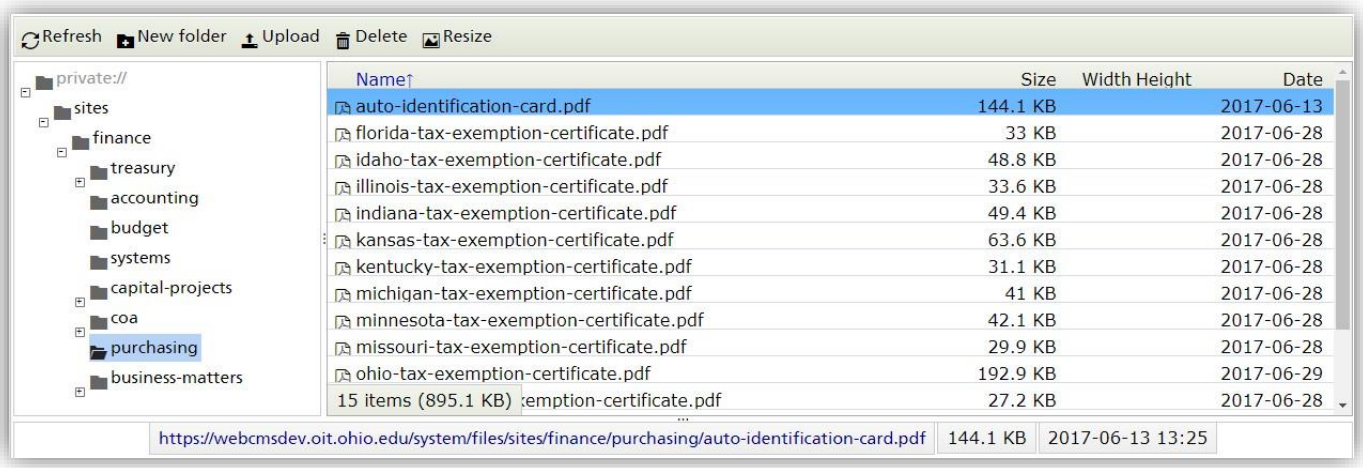
---

6. Once the file is uploaded, double click the file name in the File Manager to select it as the linked file
7. The File Manager should close and the highlighted text should now be a Hyperlink.

## Private Storage

If a file should be hidden behind a login screen:

1. Highlight the desired Hyperlink Text within the text editor.
2. Navigate to https://webcms.ohio.edu/imce/private
3. Follow steps 2 – 5 in the above Public Storage section to upload a file to the Private folder
4. Highlight the desired file by left-clicking on it once
5. The URL of the file will be shown near the bottom of the File Manager




6. Copy the URL starting *after* ohio.edu. For example, if the entire URL is https://webcms.ohio.edu/system/files/sites/finance/purchasing/auto-identification-card.pdf, highlight and copy **/system/files/sites/finance/purchasing/auto-identification-card.pdf**.
7. Return to the text editor where you have highlighted your Hyperlink Text and click the **Link** icon
8. Paste in the copied portion of the URL into the input box and click **Save**

## Updating a Document Version

Many files within the site will have new versions uploaded when updates are made. Instead of uploading a new file and editing every page that URL appears on, the file can be overridden within the website's storage.

---

**Note:** It is best practice to *overwrite* old files to keep web storage low. Old versions of files should be saved privately by individual offices and not housed on the web server.

---

When updating a document, there are three key items to know:

1. The document's current filename
2. The folder where the document is currently located
3. Whether the document is Public or Private

All three of these items can be found within the document's current URL. To view this, navigate to a page linking to the document today. For instance, if the Honorarium Agreement needs updated, navigate to the Forms page to locate it. Hovering over the Hyperlink Text for the Honorarium Agreement will display the following URL:

https://ohio.edu/sites/default/files/sites/finance/purchasing/files/honorarium-agreement.pdf

Based on this URL, we know the following:

1. To find the filename, look at the portion of the URL after the final "/". In this case, that is **honorarium-agreement.pdf**. That means when saving a new version of this file, it should be saved as a PDF and titled **honorarium-agreement**.
2. To find the folder location, look at the URL directly *before* the filename found in step 1. Go left through the URL until you get to the word **finance**. In this example, that gives us **/finance/purchasing/files/**. That tells us this document can be located in the File Manager by going to **Finance**, then **Purchasing**, then **Files**.
3. The rest of the URL tells us whether the file is in Public Storage or Private Storage. Files in Public Storage will contain **/default/files/sites/** prior to the word **finance** in the URL. Files in Private Storage will contain **/system/files/sites/** prior to the word **finance**. This particular example would be in the Public Storage folder.

Alternatively, the Ohio Tax Exemption Certificate has a URL of:

https://ohio.edu/system/files/sites/finance/purchasing/ohio-tax-exemption-certificate.pdf

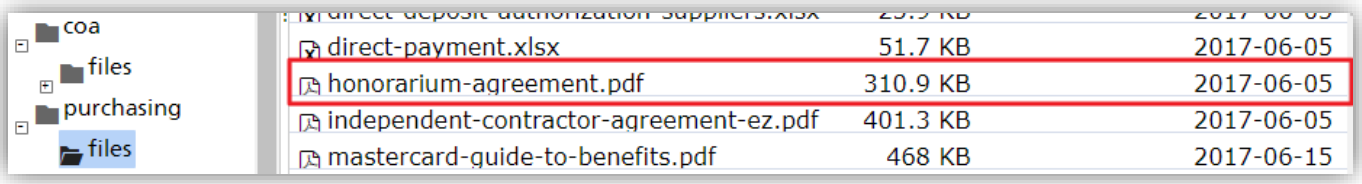
Based on this URL we know that:

1. The filename is **ohio-tax-exemption-certificate.pdf**.
2. The folder location is **/finance/purchasing/**. In the File Manager, that means we would find the file by going first to **Finance**, and then to **Purchasing**.
3. The file is in the Private Storage as the URL contains **/system/files/sites/**.

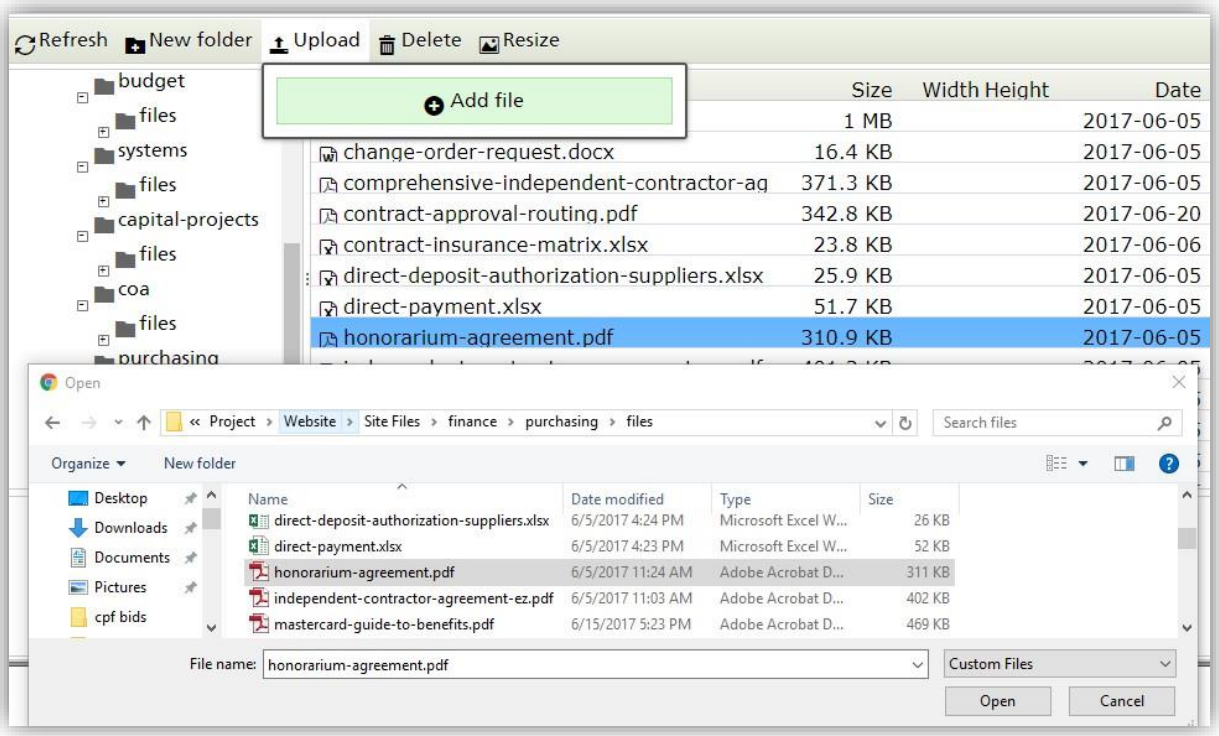
Now that we know where the file should be located, we can overwrite the old version. Open the File Manager by navigating to the appropriate URL:

- **Public Storage:** https://webcms.ohio.edu/imce/public
- **Private Storage:** https://webcms.ohio.edu/imce/private

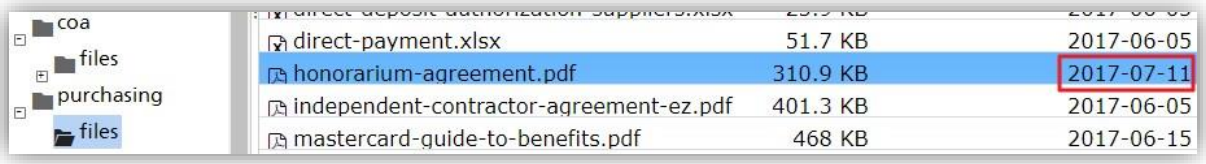
Next, navigate to the appropriate folder, found in step 2 above. Once in the correct folder, you should see the file you want to overwrite as well as its previous version date.




Upload the new file within the current folder by selecting **Upload** along the top of the File Manager. Click **Add file** and then use the File Explorer to navigate to the updated file on your computer. The file names of the old version and the new version must match *exactly*:



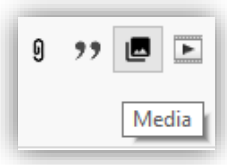

If the file names match, click **Open**. If they do not match, you will need to rename the file on your computer so that it does match. If completed correctly, the new version will *take the place* of the old version and the new uploaded date will be added:



# WORKING WITH IMAGES

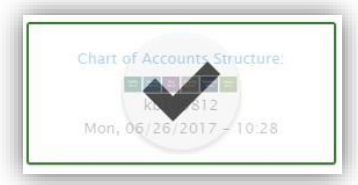
The CMS allows a shared imaging system for the entire University's web presence. This allows editors to search through the image directory to see if an image they want to use has already been uploaded. If editors are unable to find a suitable image that has been uploaded already, they can upload a new image for use on their site.

While working on a page, place the cursor where you want your image to appear. In the editor toolbar, click the media icon:




This will open a window displaying the most recent images uploaded. Editors can insert keywords into the **Media name** text box and click **Apply** to search for images. To use one of the items found in the search

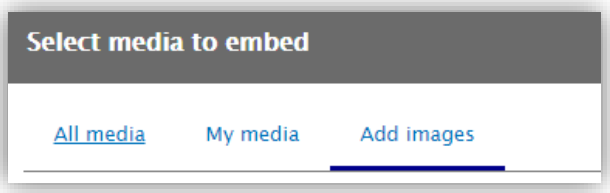
1. Click once to select it. This will overlay a checkmark on the image:




2. Next, click the **Select media** button below the displayed images.
3. In the next window, leave **Image style** and **Link image** to as their default options. Change **Align** to the option that best fits your content. This will align the image to the left, center, or right of any text near it.
4. Click **Embed** to add the image to your page.

If you would rather upload your own image instead, follow these steps once the Media window is displayed:

1. Click the **Add images** tab at the top of the widow




2. Click **Select files** to navigate your computer for the desired image. (Alternatively, drag and drop functionality works and the image can be dragged from your computer to the box in the Media module.)
3. Once an image is uploaded, the window will display **Media name** and **Alternative text** fields.

a. Input a name for the image in the **Media name** field. This will be the name that displays as others search for images within the Media module. You want it to be descriptive enough that when searching for keywords, the item will be found.

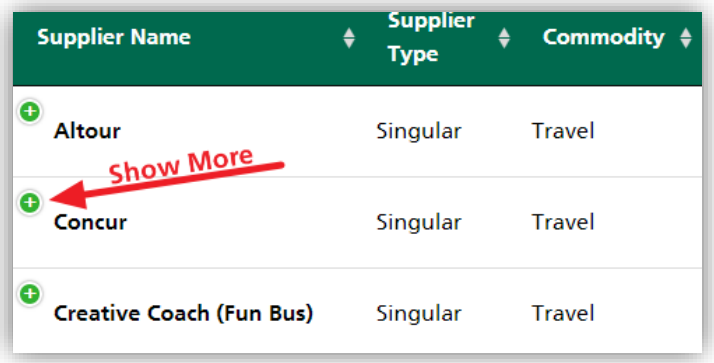
b. Input a description in the **Alternative text** field. This is the text that will be used by screen readers and search engines to describe the image when it cannot be viewed.
4. Click **Select images** once all fields are filled
5. In the next window, leave **Image style** and **Link image** to as their default options. Change **Align** to the option that best fits your content. This will align the image to the left, center, or right of any text near it.
6. Click **Embed** to add the image to your page.

## Working with Tables

Tables should be used within a website to render data that belongs in a grid. Tables should **not** be used for layouts. If the only reason to use a table is to structure information in columns, one of the Style options should be used in the Text Editor Interface.

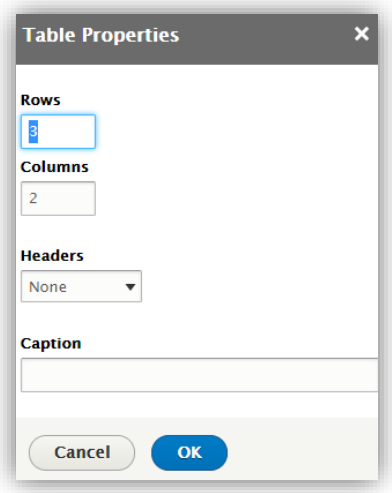
Tables in our Web CMS have additional features beyond basic web tables. Tables now have sorting and searching capabilities built in. Tables with a header row will automatically enable these features without any additional work by the editor.

For tables that have too many columns to fit on the screen, these additional columns will be hidden within a container that can be displayed when an icon is clicked:




### Creating Tables

Selecting the **Table** icon in the text editor will bring up a Table Properties window. This window has options for:




- Rows
- Columns
- Headers – Select from None, First Column, First Row, and Both. Table headers tell users how the data should be read. A row and/or column should be denoted as a header if it acts as a *descriptor* for the data.
- Caption – while not every title needs to have a caption, it acts as a short description of what data the table contains

Once the fields are completed, click **OK** to create the table.

The editor will then display an empty table with dashed lines to indicate cells. Clicking within a cell will allow data to be entered. Editors can navigate through the cells with their mouse, the arrow keys, or the Tab key.

## Editing Tables

While in a text editor, table cells can be edited by clicking within the desired cell and changing the data.

Each table has a menu accessible by right-clicking within the body of the table. This gives the following options:

1. *Paste*
2. **Cell:** This menu allows you to merge, split, add, remove, and edit properties are cells
3. **Row:** Allows you to insert or delete rows
4. **Column:** Allows you to insert or delete columns
5. **Delete Table:** Deletes the entire table
6. **Table Properties:** Edit properties for the entire table. This is the same properties window that appears when creating a new table.

For items 1-4, the cell in which you right-clicked is the one the actions takes place in. For instance, right-

clicking in the top left-most cell and then selecting “Row” and “Insert Row After” will place a new row as row two.