# Content Management User Guide

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#### Introduction

A Content Management System (CMS) allows you to maintain your website by updating text and images, adding new pages, and deleting existing pages. Editing is done to a copy of the live website and these changes are not published until a page goes through the approval process.

### **Logging in for the First Time**

To log into your site, type in your site's URL followed by "/admin" and this will take you to the sign in page. Once logged in, the Admin toolbar will appear at the bottom of the screen. This allows you to create and edit pages, upload files, and organize content. At the top of the page, you will see links to "My Account" and "Sign Out".

To change your password, click "My Account" at the top of the page, and then click "Change Password" at the bottom of the editor. Make the changes and click "Change Password" to save.

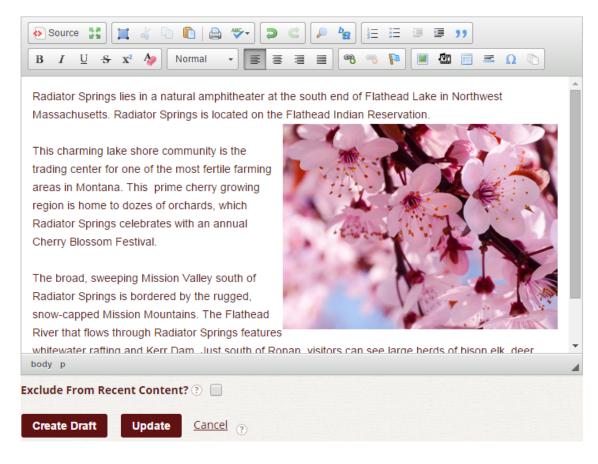
### **Understanding Roles & Permissions**

This content management system allows you to setup users with different roles. Those roles determine the permissions you have across the site. Below is a table that shows the default roles and their permissions. Note: Unique roles can be setup if requested (this is helpful if you only want someone to edit a specific section of the website).

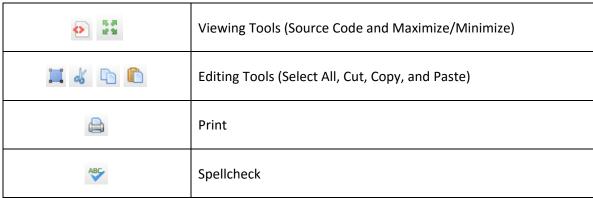
Role	Permissions
Administrator	Administrators can do anything in the site regardless of other permission settings.
Authenticated Users	Users are automatically added to this role, but can be removed from it. This role provides a method to identify all users who are authenticated (signed into the site).
Content Administrator	Content Administrators can view and edit any page in the site, regardless of permission settings on that page. The only exceptions are pages that have Administrators as the only role selected.
Content Author	Content Authors can edit HTML content features but have to submit their changes for approval. They cannot create new pages or add/edit special features.
Content Publisher	Content Publishers have the ability to edit and approve content. They can also add new pages and add features to a page.
Newsletter Administrator	Newsletter Administrators can manage and send newsletters.
Role Administrator	Role Administrators can create new users and assign roles to those users. They can also delete users and roles, except for the Administrators.

# **Editing Content Blocks**

To edit a Content Feature, you need to first go to the page which has the Content you'd like to edit. Then click the Pencil icon ( ) next to the Content Title. This will open the Text Editor (see image below).



# **Understanding the Editor Icons**

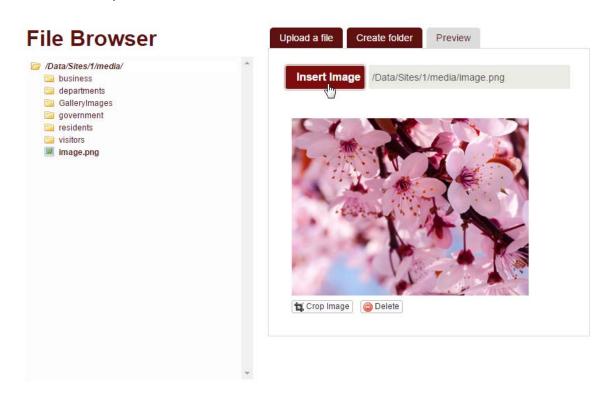


<b>3</b> C	Undo/Redo		
<i>▶</i> <b>b</b> 2	Find and Replace		
99 B I U S	Text Style (Block quote, Bold, Italic, Underline, and Strikethrough)		
A	Remove Formatting		
	nordered and Ordered Lists		
Indent (Left and Right)			
<b>E E E</b>	Paragraph Alignment (Left, Center, Right and Full)		
<b>9 9</b>	Insert Link/Remove Link		
B	Anchor		
	Insert/Edit Image		
<b>යා</b>	Embed Media		
	Insert Table		
=	Insert Horizontal Line		
Ω	Insert Special Character		
	Templates		

## **Inserting a New Image into a Content Block**

Perform the following steps to insert an image into a content feature:

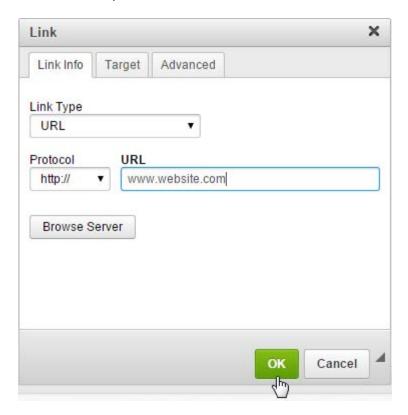
- 1. Navigate to the page you wish to edit and click the Pencil icon beside the content title. This will open the text editor window.
- 2. Position the cursor in the editor where you would like to insert an image and click the insert image button on the toolbar.
- 3. In the "Image Properties" window, click the "Browse Server" button on the right.
- 4. In the "Upload a file" tab, click the "Select File" button to find your image.
- 5. Locate the image you wish to upload and click "Open". When it takes you back to the "File Browser" window, click "Upload".
- 6. Next, select a file from the tree menu to the left. Once you click the image, you'll be able to preview it. Click "Insert Image" to add the image.
- 7. This will take your back to the "Image Properties" window. To add your new image, click "OK".
- 8. Click "Update Draft" to save.



# Inserting a Link into a Content Block

- 1. Navigate to the page you wish to edit and click the Pencil icon beside the content title. This will open the text editor window.
- 2. Type or select the text or image that you would like to link and click the insert hyperlink button on the toolbar.

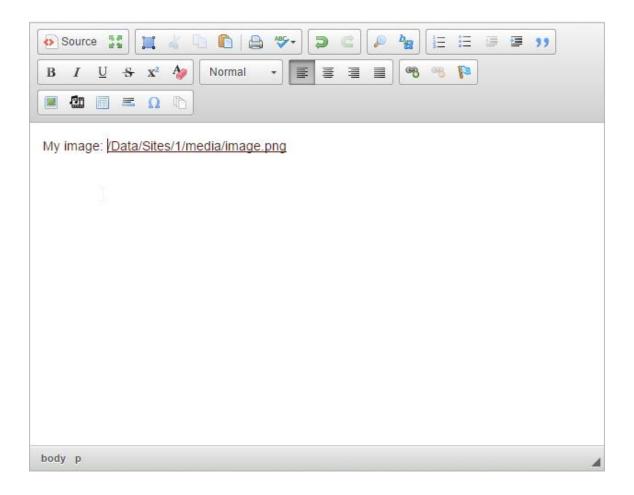
- 3. In the "Link" window, paste or type the URL you wish to link to in the "URL" field and click "OK".
- 4. Click "Update Draft" to save.



Note: Typing the full URL or a website or an email address will automatically turn the text into a link (ex: <a href="http://www.vc3.com">http://www.vc3.com</a> or <a href="mailto:name@vc3.com">name@vc3.com</a>)

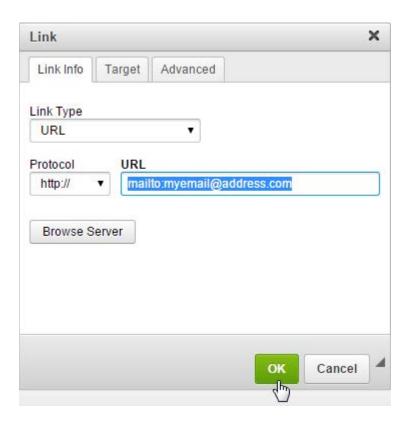
#### Linking to a File or Image

- 1. Navigate to the page you wish to edit and click the Pencil icon beside the content title. This will open the text editor window.
- 2. Select the text or image that you would like to link and click the insert hyperlink button on the toolbar.
- 3. Click the "Browse Server" icon located below the "URL" field.
- 4. In the "Upload a file" tab, click the "Select File" button to find your file or image.
- 5. Locate the image you wish to upload and click "Open". When it takes you back to the "File Browser" window, click "Upload".
- 6. Next, select the file from the tree menu to the left. Once you click the image you'll be able to preview it. Click "Select" to add the image.
- 7. This will take your back to the "Link" window and the file or image URL will automatically be placed in the "URL" field. Click "OK".
- 8. Click "Update Draft" to save.



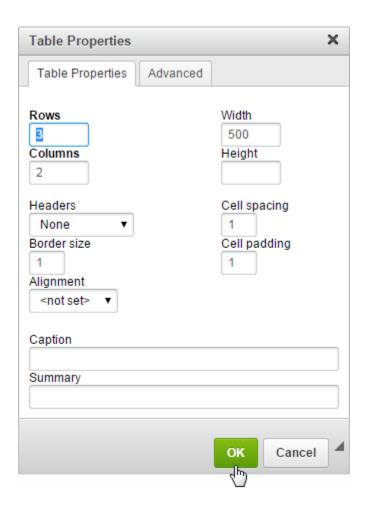
#### **Linking to an Email Address**

- 1. Navigate to the page you wish to edit and click the Pencil icon beside the content title. This will open the text editor window.
- 2. Select the text or image that you would like to link and click the insert hyperlink button on the toolbar.
- 3. In the "Link" window, type **mailto:** and then type or paste the email address you wish to link to in the "URL" field and click "OK".
  - (EXAMPLE: "mailto:jdoe@vc3.com")
- 4. Click "Update Draft" to save.



### **Inserting a Table into a Content Block**

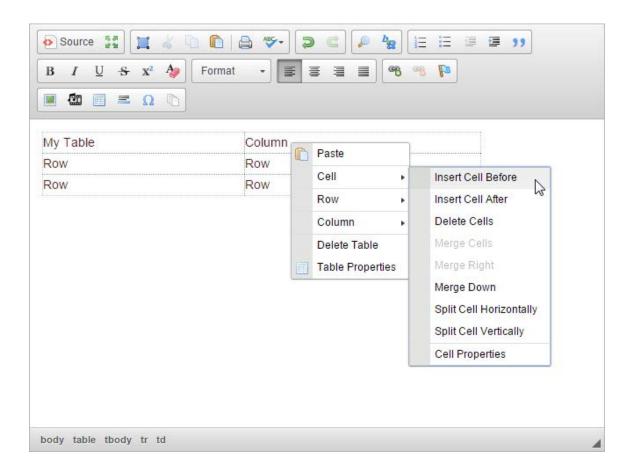
- 1. Navigate to the page you wish to edit and click the Pencil icon beside the content title. This will open the text editor window.
- 2. Position the cursor in the editor where you would like to insert a table and click the "Table" icon.
- 3. Adjust the table properties in the window as needed by entering in the number of rows and columns and selecting the border size, padding, and other properties.
- 4. Click "OK."
- 5. Add content to the newly inserted table.
- 6. Click "Update Draft" to save.



#### **Editing a Table**

Once you have inserted a table into your content block, you can add new rows or columns or edit table properties by performing the following steps:

- 1. Navigate to the page you wish to edit and click the "Edit" link beside the content title, this will open the text editor window.
- 2. To edit the style of the table, select the table you wish to edit and click the "Insert/Modify Table" Icon.
- 3. To add a row, right-click inside one of the table cells and rollover "Row". When the next menu appears, select "Insert Row Before" or "Insert Row After".
- 4. To add a column, right-click inside one of the table cells and rollover "Column". When the next menu appears, select "Insert Column Before" or "Insert Column After".
- 5. Click "Update Draft" to save.



# **Reverting Content**

If you have edited content on a particular page and wish to discard your changes and the page is still a working draft, you can revert the content back to the live version.

- 1. Navigate to the page and content block you wish to revert back to the live version.
- 2. Click the "Cancel Content Changes (Delete Draft Version)" icon beside the content block title.
- 3. A pop-up window will appear asking you if you're sure you want to make these changes, if this is correct, select "OK".

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# **Submitting Content for Approval**

If you do not have permissions to publish pages, you'll need to submit for changes for approval. After you have selected "Update Draft" on your content block you will now see new icons appear beside the title of your content block. To submit your changes for approval, click the

"Request for Approval" icon



If you are an approver you will receive an email indicating that changes were made and a link to view those changes. Once there you'll be able to review the changes, make any edits if needed and then reject or approve the submitter's draft.

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# **Creating a New Page**

Click "New Page" on the Admin toolbar.

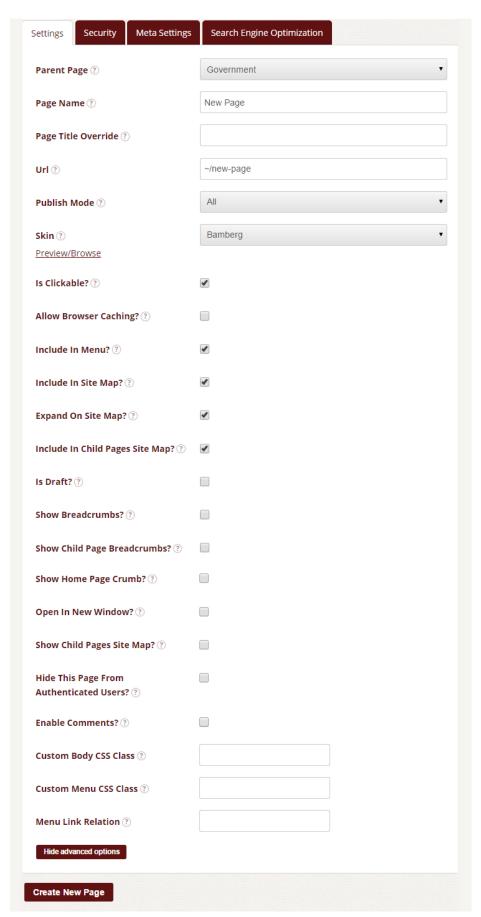


### **Overview of Basic Settings**

- Parent Page: Where you want your page to be published on the website.
- Page Name: The name of your page as it appears in the Menu/Navigation. The
  information you type here will be automatically populated to the URL field.
- URL: The page name automatically sets the URL of the page, but you can manually change it if you wish. Be sure to only change the name section and not the page extension or "~/"
- Include in Menu: If you don't want the page to be shown in the menu, you can uncheck this setting. It does not prevent the page from being viewed if the user visits the URL for the page; it just leaves it out of the menu.
- Include in Site Map: You generally should leave this checked so that all pages show up in the site map. The site map is filtered by roles already, that is, users only see pages if they are in a role that can view the page. The main reason for this setting is to make it possible to include pages in the site map even if they are not included in the menu.
- **Is Draft:** You can mark a new page as a draft if it has only draft content on it. This will make it only appear in the menu for users in the Draft Edit Roles and roles that can approve the content.
- **Show Breadcrumbs:** Bread crumbs help a user to see where they are in the site. It is mostly useful on pages below the root level pages.
- Show Home Page Crumb: Adds a crumb for the home page to the breadcrumbs. Only applies if "Show Breadcrumbs" is enabled. Generally you would not want to enable this on your home page since it already will show in the breadcrumbs.

VC3 has set up your site's page settings to have the appropriate check boxes already selected – unchecking boxes or checking new boxes won't be necessary. Click "Create New Page". This creates the new page and adds two extra options at the top of the page: "Add/Remove Features on This Page" and "View This Page".

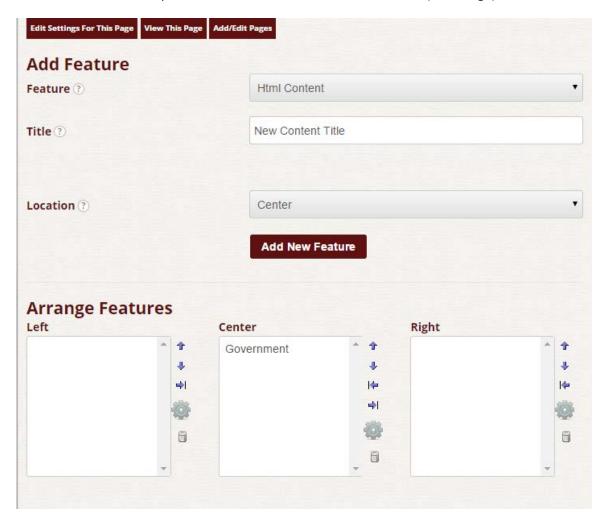
#### **Example of Page Settings:**



When we create a new page, we have created the "shell" that the content will go into. Once the page is created, in order to add content, we must apply a Feature to the page.

# Adding and Removing Features (Content Blocks) to New or Current Pages

Features can be added to a web page at any time by clicking "Edit This Page" on the Admin toolbar. To add an area for text, links, images, video, etc., you will select the Feature "HTML Content". Follow the steps below to Add or Remove a Content Block (See Image).



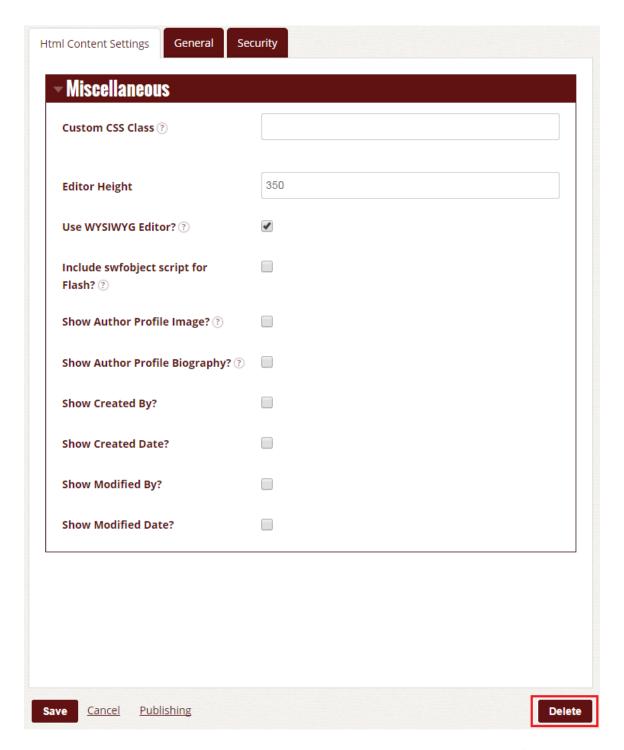
### **Adding a Content Block**

- 1. **Feature:** Select "HTML Content" from the drop down menu.
- 2. **Title:** Enter a Title for the content you are adding to the page.
- 3. **Location:** Choose the content region of the page where you would like to put the feature.
- 4. Click "Add New Feature."
- 5. This will add your Content to the location panel you selected. You can use the arrow icons to move your content around on the page. The cog icon allows you to edit the Content and the Trash Can icon allows you to delete the feature.
- 6. Once your Content is where you want it, click "View This Page" at the top to generate the page with the new Content.



### **Removing a Content Block**

- 1. Navigate to the content block you wish to delete and click the cog icon beside the content title, this will take you to the "Feature Instance Settings" page.
- 2. Click the "Delete" button at the bottom of the page.
- 3. A pop-up window will appear asking you if you're sure you want to delete the content block, if this is correct, select "OK".

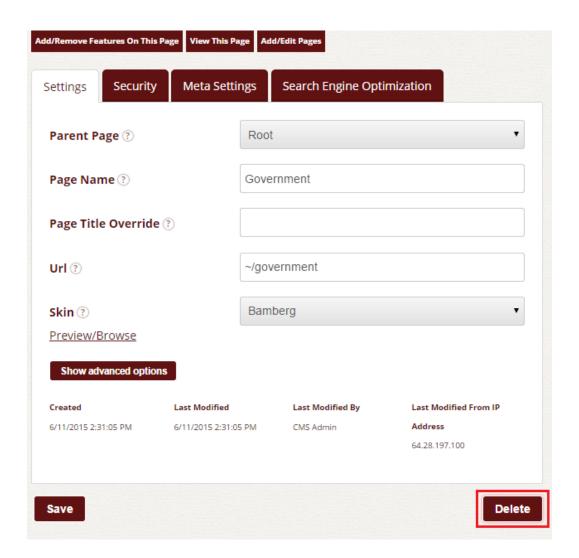


Note: Be very cautious when deleting content blocks because when deleted, that information may not be able to be retrieved and content versioning for that content block will be lost. In most cases, it is safer to change the information within the content block rather than deleting it.

## **Deleting Pages**

Pages can be deleted from the website. Do not delete a page if there are hyperlinks that exist on the site to that particular page. This could result in broken links on your site. To delete a page, perform the following steps:

- 1. Navigate to the page you wish to delete and click "Page Settings" on the Admin toolbar.
- 2. Click the "Delete" button at the bottom of the page.
- 3. A pop-up window will appear asking you if you're sure you want to delete the page, if this is correct, select "OK".



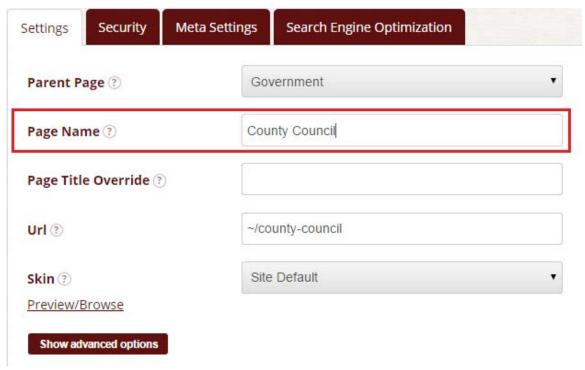
# **Changing the Page Name**

Perform the following steps to change the Page Name:

1. Navigate to the page you wish to change and click "Page Settings" on the Admin toolbar.

- 2. Change the name of your page in the field marked "Page Name"
- 3. Click "Save" to make changes.

**NOTE:** Whenever you the page name, the URL field will automatically change to match what your page name is. You can manually change the URL if you want. If the URL does change then the CMS will create a redirect in the system so that anyone going to the old URL will not be redirected to the new URL.

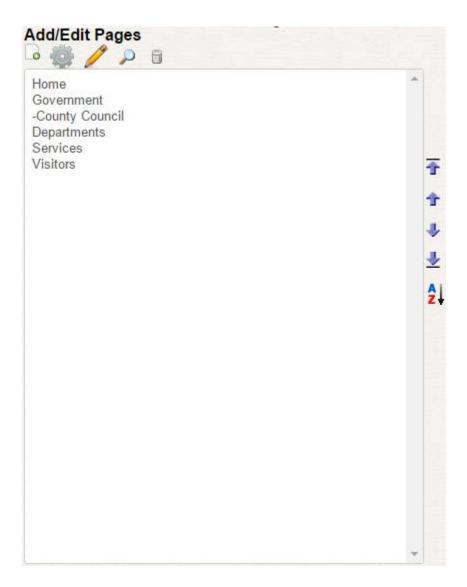


# **Moving a Page**

The steps below allow you to either move your page to another section or change the order of pages in the navigation.

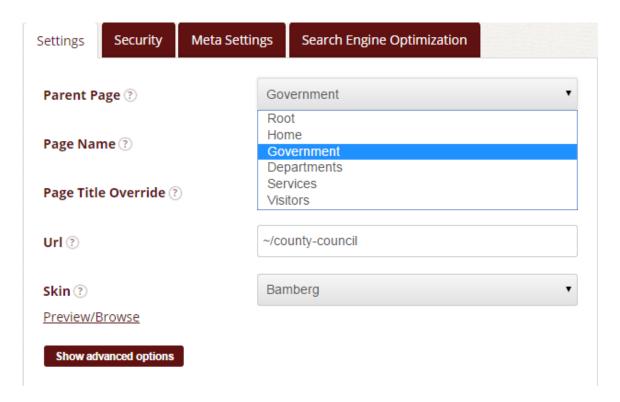
#### To change the order of pages in the navigation:

- 1. Click "Page Settings" (on the Admin toolbar at the bottom of your screen).
- 2. Click "Add/Edit Pages" on the top.
- 3. Click the page you wish to move and then click the up/down arrows to move the page in the site hierarchy (which will then relocate in the site navigation/menu).



#### To move a page to another section:

- 1. Navigate to the page you wish to change and click "Page Settings" on the Admin toolbar.
- 2. In the first field called "Parent Page" click the drop down or click 'Browse' and select the new parent page you want this page to be located under.
- 3. Click "Save" to make changes.



# **Placing Pages in Alphabetical Order**

When you add a new page, it automatically adds that page to the end of the menu list rather than in alphabetical order. If you wish to keep your pages in alphabetical order, follow the steps below.

- 1. Click "Page List" (on Admin toolbar at the bottom of your screen).
- 2. Select a parent page of the menu you wish to organize.
- 3. Click the icon to the right and it will sort your pages alphabetically.

**NOTE:** You can also go here to edit page content or delete pages.

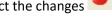
# **Publishing Content**

Only users with the permissions to approve content will be able to publish content on pages. To approve content, go to the page in which content needs to be approved. You will see two new

icons by the content title. One allows you to approve the changes and one allows you to



reject the changes -.



If you select to approve the changes, the content will then become live.

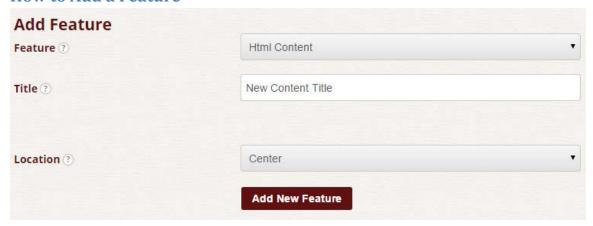
If you select to reject the changes, you will be directed to a new page where you will be allowed you to write the reasons the content was rejected and it will be sent to the user who submitted the changes.



# **Adding Other Features**

In some cases, you may want to add a feature to your page that isn't a HTML Content block. This content management system allows you to put several useful features on your page such as an event calendar, a feed manager, an image gallery, and much more.

#### How to Add a Feature



- 1. Once you're on the page you would like to add a feature to, click "Edit This Page" in the Admin toolbar.
- 2. This will take you to a page that shows all of the content for the page. Fill out the information for steps 3-5.
- 3. **Feature:** Select the feature you would like to add.
- 4. **Title:** Enter a Title for the content you are adding to the page.
- 5. **Location:** Choose the content region of the page where you would like to put the feature (in most cases, "Center" will be where the main content for your site will go).
- 6. Click "Create New Content"
- 7. This will add your Content to the location panel you selected. You can use the arrow icons to move your content around on the page. The cog icon allows you to edit the Content and the Trash Can icon allows you to delete the feature.
- 8. Once your Content is where you want it, click "View This Page" to generate the page with the new Content.

# Adding/Editing an Event Calendar

A popular feature to add to your site will be an event calendar. This can be added to your site by following the steps from "How to Add a Feature" and selecting "Event Calendar" or "Event Calendar Pro by Source Tree Solutions" as your feature. If you know you will multiple day events or would like an RSS feed for your calendar, make sure you select "Event Calendar Pro by Source Tree Solutions".

# My Calendar

≤ June 2015 ≥								
Sun	Mon	Tue	Wed	Thu	Fri	Sat		
<u>31</u>	1	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>		
Z	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>		
14	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>		
<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	<u>26</u>	27		
<u>28</u>	<u>29</u>	30 Pool Party	1	2	<u>3</u>	4 Fourth of July!		
<u>5</u>	<u>6</u>	Z	<u>8</u>	<u>9</u>	<u>10</u>	11		

#### **Adding a New Event:**

- 1. Once you are back on your page with the Calendar feature added, click "Add Event" beside the title of your calendar.
- 2. Fill out all of the information for the event under the "Event Settings" tab. If you're event has a location and you would like to show a map, check "Show Map". If there is no location (such as a holiday), you may leave Location blank.
- **3.** If you want to provide a brief description of the event and/or photos, click the "Details" tab. Add your content as you would in a normal content block.
- **4.** If you want to display your calendar in list view and want a short summary of the event to be seen, click the "Summary" tab and add your information.
- **5.** The other tabs may be left alone. Click "Save" to save your new event.

#### **Editing an Event on the Calendar:**

- 1. Go to the page with your event calendar and find the event you want to edit on the calendar.
- 2. Click the pencil icon beside the name of the event you wish to edit.
- 3. Edit the information that needs to change, once you're done, click "Save".

#### **Deleting an Event on the Calendar:**

- 1. Go to the page with your event calendar and find the event you want to edit on the calendar.
- 2. Click the pencil icon beside the name of the event you wish to delete.
- 3. Click "Delete" at the bottom of the page, an alert window will appear confirming if you wish to delete this event, if so click "OK".

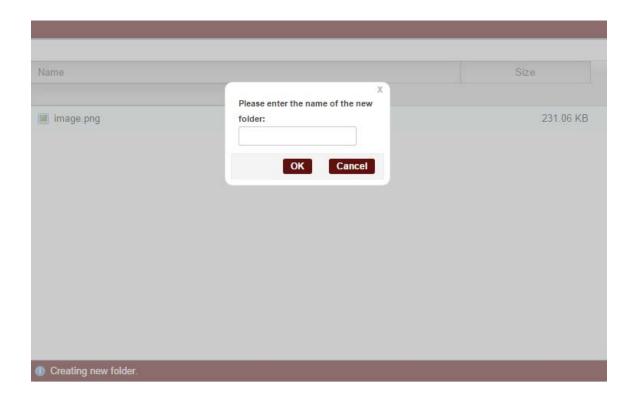
# File Manager

The File Manager allows you to manage supporting files on your website such as images, PDFs, and Word documents. These files can be organized into folders. **The max file size users can upload is 50MB**.

## **Adding a New Folder**

In order to add a new folder, perform the following steps:

- 2. Stay in the root folder or browse to the folder you wish to add a subfolder to.
- 3. At the top under "Create Folder", type in the name of the new folder in the textbox at the bottom.
- 4. Click the "Create New Folder" button.



# **Uploading a New Resource**

Resources are managed similarly to pages on your site. New resources must be approved before being available on the live site. In order to add a new resource, perform the following steps:

- If you are an administrator, you can click "File Manager" on the Admin toolbar. If not, you can access the File Manager the same way you would to add a new image to a content block (open a content block, click the insert image icon and in the "Insert/Edit Image" window, click the "Browse Server" icon on the right.
- 2. Browse to the folder you wish to add the new resource to.
- 3. Click the Browse button at the bottom of the Resource Explorer window.
- 4. Select a file to upload and click the Open button.
- 5. Click the Upload Button below the "Browse" button.

# **Additional Help & Resources**

#### **PDF Converter**

If you have the latest suite of Microsoft Office 2013, you can convert word documents to pdf files. To do this:

- Click File.
- Select Export from the list on the left.
- Click on Create PDF/XPS Document.

#### **Image Software**

Usually, when adding images to the site, the image needs to be edited first before uploading it because they are typically much larger than needed for the website. Images for the site are usually a resolution of 72 dpi, or dots per inch. To edit photos you can visit <a href="http://pixlr.com/editor/which">http://pixlr.com/editor/which is a free, online photo editor.</a>

#### **Additional Guides & FAQ**

For additional CMS guides or FAQ regarding our CMS, please click the "CMS Help" button on the Admin toolbar when logged into your website.