Contensis

The basics

June 2012

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Introduction

The chosen Content Management System (CMS) at The University of Nottingham is Contensis by Genetics. Since 2009, websites have been migrated across from various other systems to Contensis and have since been redesigned to meet our current corporate branding and identity guidelines (provided by Campbell Rowley).

Browsers and settings

The preferred browser for use with Contensis is **Internet Explorer 8**. Certain settings need to be made before using Contensis for the first time and if your machine is ever upgraded or replaced.

Set caching

Your browser must be configured to check for newer versions of stored pages on every visit to pages. Follow these steps for your chosen browser:

**Internet Explorer**
1. go to **tools>internet options**
2. under **browsing history** select **settings**
3. set IE8 to check for newer versions of stored pages on **every visit to the page**
4. ok>ok

**Firefox**
1. in the address bar, type **about:config** and hit enter
2. click "I’ll be careful, I promise" button (if displayed)
3. in the filter bar, type **browser.cache.check_doc_frequency** and hit enter
4. change the integer value to **1** and
5. ok

Trusted site

If using IE8, set Contensis as a trusted site. This ensures that the program works as expected, particularly how things appear onscreen.

1. go to **tools>internet options**
2. select the **security tab**
3. choose **trusted sites**
4. click the **sites** button
5. **un-tick** the "Require server verification (https) for all sites in this zone".
6. add **https://edit.nottingham.ac.uk** to the list of websites
7. close
Logging in and out

Logging in

A login will not be issued until the relevant level of training has been completed. Once training is complete, your unit coordinator needs to request access by emailing staff-it-helpline@nottingham.ac.uk.

Login - [https://edit.nottingham.ac.uk](https://edit.nottingham.ac.uk)

Use your regular Novell credentials to login to Contensis (unless you have been told otherwise).

Logging out

It is not essential to log out after each Contensis session. However, if you wish to do so, click on the orange key on the top toolbar. If you have work checked out you will be asked whether you want to check it back in or not.

Roles

Each department, school etc. uses its own user groups (one for each role type):

_Admin

Admin rights are usually restricted to unit coordinators. Admin training is essential. Admin may request the ability to create HTML snippets and mini templates within their site.

_Approver

Approvers don’t generally edit pages. Editors submit work to an approver who approves or declines it. If work isn’t suitable, it will be returned to the editor for amends. If it is suitable, the approver will publish it. Approvers are responsible for checking quality, usability and accessibility before publishing. If someone with approver permissions edits a page, they should still submit the page for authorisation to another approver.

_Editor

Editors can create and edit content and submit for approval. An approver decides whether the work is suitable to be published to the live web. If not, work will be declined and returned for amends.

_Viewer

Viewer permissions allow users to view content in selected folders in the CMS, but not to edit. This is useful when someone needs to link to another site.

_NewsAndEvents / _FormAdmin

Useful when you want to give a user permission to only work on news, events and forms. Content needs to be submitted for approval. Editors have the same permissions as with regular content.

A summary of what permissions each role has is shown under Permissions (page 4).

Should I check in?

Checking content in will allow others to edit the page. If your page is checked out and you go on holiday for two weeks (for example) other editors won’t be able to access the page until you return. However, unit coordinators/admin have permission to check in content on behalf of someone else.
## Permissions

The tables below show what permissions need to be assigned to each user group:

<table>
<thead>
<tr>
<th>Folders</th>
<th>Editor</th>
<th>Approver</th>
<th>Admin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>Administrator folders, content types, permissions, user access, meta data, menu options, page templates, publishing, advanced options, re-publish folder content, approve all folder content, create, edit .xml files (e.g. subsitedata)</td>
</tr>
<tr>
<td>View</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>View folders within a site/section</td>
</tr>
<tr>
<td>Create</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Create new folders</td>
</tr>
<tr>
<td>Delete</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>Deletes permanently – use with caution</td>
</tr>
<tr>
<td>Rename</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>Rename folders</td>
</tr>
<tr>
<td>Manage menu</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>Reorder menu items (drag and drop interface)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pages and documents</th>
<th>Editor</th>
<th>Approver</th>
<th>Admin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Create new page/documents</td>
</tr>
<tr>
<td>Edit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Edit (for documents, edit properties/upload new version)</td>
</tr>
<tr>
<td>Approve</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>Publishes to the live web (can also decline/return to editor)</td>
</tr>
<tr>
<td>Archive</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>Removes from live web/remains in the navigator Un-archive (appears on test* until published)</td>
</tr>
<tr>
<td>Delete</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>Deletes permanently – use with caution</td>
</tr>
<tr>
<td>View</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>View (and link to)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Images</th>
<th>Editor</th>
<th>Approver</th>
<th>Admin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Upload, bulk upload, add alt text</td>
</tr>
<tr>
<td>Edit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Create variation, change description, keywords, alt text</td>
</tr>
<tr>
<td>Delete</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>Deletes permanently – use with caution</td>
</tr>
<tr>
<td>View</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>View (and use on your pages)</td>
</tr>
<tr>
<td>Images</td>
<td>Editor</td>
<td>Approver</td>
<td>Admin</td>
<td>NewsAndEvents</td>
</tr>
<tr>
<td>--------</td>
<td>--------</td>
<td>----------</td>
<td>-------</td>
<td>---------------</td>
</tr>
<tr>
<td>Create</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Edit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Delete</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>View</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>News, events and forms</th>
<th>Editor</th>
<th>Approver</th>
<th>Admin</th>
<th>NewsAndEvents</th>
<th>FormAdmin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Users in a news and events or forms group have the same permissions as a regular editor.</td>
</tr>
<tr>
<td>Edit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>The reason separate user groups are used is so that users can have permission to edit news, events or forms but not other content.</td>
</tr>
<tr>
<td>Approve</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
<td></td>
</tr>
<tr>
<td>Archive</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
<td></td>
</tr>
<tr>
<td>View</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

*test refers to the following work in progress servers:
- [http://cmswip01.nottingham.ac.uk](http://cmswip01.nottingham.ac.uk)
- [http://cmswip.nottingham.edu.cn](http://cmswip.nottingham.edu.cn)
- [http://cmswip.nottingham.edu.my](http://cmswip.nottingham.edu.my)

We are currently changing the way we use video on the web. Soon, it won’t be possible to upload video to Contensis. Instead, video will be streamed from a dedicated server and pulled into web pages. More details will follow as and when changes are in place.

All roles have view access to the shared resources folder, where they have the ability to drag and drop various layouts.
Contensis interface

There are 4 main areas within the Contensis interface:

- dashboard
- top bar
- navigator
- content area/content toolbar

Dashboard

When you first login, you will be presented with the Contensis dashboard. This is a summary of actions carried out under your profile. It allows you to create new content, shows files you have recently worked on and content awaiting your approval (if applicable). It also shows a live feed of what others are doing in Contensis. Users can access the dashboard at any time by clicking on the home button on the top bar.

The Google Analytics module shown on the dashboard is not currently functional. For Google Analytics for your site please contact staff-it-helpline@nottingham.ac.uk.

Take a few minutes to familiarise yourself with the Contensis interface/layout.

When in edit mode of a page, the dashboard becomes the content area.

Top bar
**Navigator**

The navigator on the left hand side of the window allows you to:

- view site structure (folders/pages etc)
- create and edit content
- manage menu (if permissions allow)
- set a folder homepage
- access content information
- access content properties
- archive content (if permissions allow)
- rename content (if permissions allow)
- access shared resources
- switch between Nottingham, China and Malaysia projects (if permissions allow)

The above options (and more depending on permissions) are available by left or right clicking on a folder, content type or page.

You will only see folders you have view permissions for.

**Content area/content toolbar**

When editing content, this is what you will see. This area includes the content toolbar:

[Content toolbar image]

The content toolbar allows you to change various properties, add keywords, submit for approval, approve (if permissions allow), set a publishing schedule and revert to a previous version.

**Save**

Saving a page will not publish the page to the live web. It will however create a test version of the page which can be previewed.

**Create a Copy**

This allows you to create a copy of a page and save it elsewhere. If in the same folder, remember to rename the filename.

**Preview**

<table>
<thead>
<tr>
<th>Preview type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preview</td>
<td>Preview the current saved version.</td>
</tr>
<tr>
<td>Preview changes to test</td>
<td>Preview changes to test.</td>
</tr>
<tr>
<td>Preview current live version</td>
<td>Displays the current live version of the page (if the site is live).</td>
</tr>
<tr>
<td>Preview dualView</td>
<td>When this feature is functioning properly, it will show the current live version alongside the current test version providing an easy comparison.</td>
</tr>
</tbody>
</table>

**Shadow copy** – tick this box in the create copy dialogue if you want the content to remain the same on both pages. The original will become the master copy.
Quality/Quality check

When this feature is fully functional, it lists all accessibility issues on the page which need to be changed before publishing.

Quality Report

When this feature is fully functional, it displays a report for that page.

Workflow

<table>
<thead>
<tr>
<th>Workflow function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check In</td>
<td>This takes the page out of edit mode so others can make changes. If you want to save changes, you must save the page before checking it in. This will not publish or submit your page for approval.</td>
</tr>
<tr>
<td>Pass to another user</td>
<td>If you would like another user to add to your work, select this option and select which user to pass it to and add a message. Only users within the relevant groups will be listed (along with all system administrators).</td>
</tr>
<tr>
<td>Submit (for approval)</td>
<td>Notifies approvers within the same group as you that work is awaiting authorisation.</td>
</tr>
<tr>
<td>Submit with message (for approval)</td>
<td>The same as above but it allows you to send a message too.</td>
</tr>
<tr>
<td>Submit and approve</td>
<td>Only approvers, admin and system administrators will see this option. Once selected, the page will publish to the live web. This goes into more detail in the approver training.</td>
</tr>
<tr>
<td>Revoke and edit</td>
<td>This will only work if the next user hasn’t already started to work on it or approved it. It allows an approver to edit the page.</td>
</tr>
</tbody>
</table>

Content tab

This is where the WYSIWYG tool bar appears and the main editable area of your page. Within the editable area you add your content, imagery, apply layouts and much more.

Meta Data tab

Meta Data identifies the content of a web page. In Contensis, we apply keywords and descriptions to our pages.

Properties tab

This gives general information about the content including its filename, what stylesheet it uses (if any), when it was created etc.

It also allows you to set whether the content appears in the menu, search etc.

You can set your content to publish on a specific date and time.

Version history tab

When content is submitted (not saved), a version is created. This function allows you to preview and revert back to previous versions.
Comments
Leave useful comments for other users.

Title
Some pages have their title (heading 1) automatically pulled in from this setting. This also appears in the title bar in your browser. The title should be relevant to the content.

Menu
This is how your content title appears in the menu. Often people alter/shorten this.

Editable areas
The screenshot below highlights (in red) the areas that may be edited.

User profile
Every CMS user should complete their personal profile within Contensis.
1. access your user profile from the top bar
2. complete as much information as possible (an email address is essential)
3. save

Shared resources
All users of Contensis have view only access to the ‘shared resources’ folder and it can be accessed via the navigator. Here you will find various:
- mini templates/layouts - [www.nottingham.ac.uk/web/webteamsupport/cms/minitemplates](http://www.nottingham.ac.uk/web/webteamsupport/cms/minitemplates)
- HTML snippets - [www.nottingham.ac.uk/web/webteamsupport/cms/htmlsnippets](http://www.nottingham.ac.uk/web/webteamsupport/cms/htmlsnippets)
- images
- hyperlinks
- documents

Visit the above web pages for more information and examples. You will find lots of useful information on our support site ([www.nottingham.ac.uk/web/webteamsupport](http://www.nottingham.ac.uk/web/webteamsupport)) so please use it as your first port of call when you have a query. If you can’t find the answer you are looking for, contact the staff-it-helpline@nottingham.ac.uk.