Editor basics

in Contensis CMS

In this guide

Content and layout tips

There are three priorities to think about when creating page layouts:

- Navigability
- Readability
- Accessibility

When reading web pages, people:

- scan for headings and links
- don't read from top to bottom
- look for important information at the top of a page and at the start of a paragraph

Small ways to make a big difference:

- Chunking (breaking up content into smaller blocks)
- Bullets
- White space

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- Headers
- Short pages
- Self-contained paragraphs
- Front loading – start a sentence with the conclusion then work backwards
- Left aligned (do not justify or centre align)
- One topic per page
- Simple language
- Active not passive words (‘we won the award’ not ‘the award was won by us’)
- Active not passive sentences (‘Students take exams at the end of each year’ not ‘Exams are taken by students at the end of each year’)

Headings

On the web it is important to signpost content, so information is as easy and quick to find as possible. Headings allow users to quickly assess the page for relevance and find the sections that are most useful to them.

Rather than using bold or underline to emphasise important words and phrases, you should use headings, as search engines will use these to understand the content of your page.

Nested headings
Heading 1 is for the most important signposting word or phrase (and also used at the page title) – usually at the top of the page – and this continues in descending order through Heading 2, Heading 3, Heading 4 and so on.

Headings should be used in a logical order - don't use a Heading 3 because you like how it looks, only use it if it's subheading for a section that has a Heading 2.

Text formatting, styles, accessibility

It is important for the university’s web presence to be consistent in terms of styles and approaches. This is why there are formatting and style conventions in place. These conventions are also important for ensuring accessibility for all web users.

- Do use title and alt (hover) text on links and images
- Do provide an alternative to video
- Don’t justify or centre align text
- Don’t use all capitals
- Don’t use colour (colour and design are controlled by the web team)

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Pop-ups

When you insert a hyperlink into a webpage, you get the option to open in a new window. The default is no, please do not change this setting.

This is because pop-ups compromise the accessibility of the university's site – which is very important and should always be considered when editing pages.

Alt tags

Alt tags are accessibility essentials.

The alt tag appears when you hover over an image. It should describe the picture, for example, 'Two students in Hallward Library'.

Alt tags are predominantly used by screen reader users. The website is read aloud, but if images don't have alt tags, the screen reader can't describe the image to the user and simply reads the word 'image'.

Contextualised linking

When linking to web content, do not use 'Click here'. This also includes variants such as 'follow this link', 'more information', etc.

- Links should make sense when taken out of context
- The link label should indicate where the link will take the user

There are two main reasons for using contextual linking:

- Search engine optimisation (SEO) – Google and other search engines give more weight to hyperlinked text when calculating the relevance of a page to particular keywords. Ensuring your link text is meaningful and contains relevant keywords, will benefit rankings.
- Accessibility – Screen readers read link text to a user. If the link text doesn't make sense, the link will make no sense to the user.

Alternative content

You must always offer alternative content whenever using videos or image-based content (for example, diagrams, infographics etc) on your website. This is for accessibility purposes.

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Folders

The main structure of your site consists of folders and pages. When you login, there's a folder for each site you have permission for. Create folders and pages to begin the structure of your site:

Create

- Click on the folder in which you want to create a subfolder
- Select new folder
- Give it a menu name and folder name

Rename and delete

You must contact an approver to rename or delete a folder.

- Click on the folder you wish to rename or delete
- Select rename or delete
- Type in the new name (if renaming)

Naming

- Menu name - how it appears on the live site in the menu.
- Folder name - how it appears in Contensis (don't use spaces or punctuation). This will auto complete but can be changed.
- Where a folder homepage is set, the folder acts as the menu name.
- Renaming folders – do this with extreme caution as it will change the URL. Will you need a redirect setting up?

Metadata tab

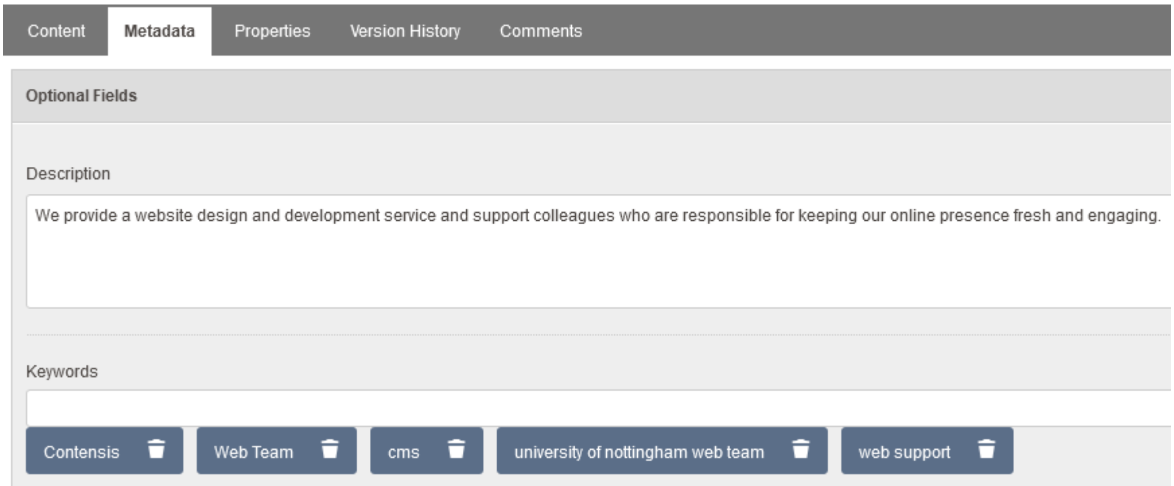
All (or at least the main) pages in your site should contain relevant keywords and descriptions.

We use keywords, URLs, title tags, headings, links and content to tell both users and search engines what the page is about. That way, users can easily find what they are looking for and search engines can accurately assess relevance when determining rankings.

Keywords and meta descriptions are not used in determining search engine rankings, but descriptions are displayed in search results so that users can assess the relevance of the links displayed.

Adding metadata

1. In edit mode, select the Metadata tab from the content toolbar
2. Input your description in the space provided - keep this short and include some of your keywords, ensuring your descriptions are accurate, relevant, compelling and informative
3. Add keywords in the space provided (separate with a comma) - clicking out of the keywords field will add keywords



Properties tab

Here you can do the following:

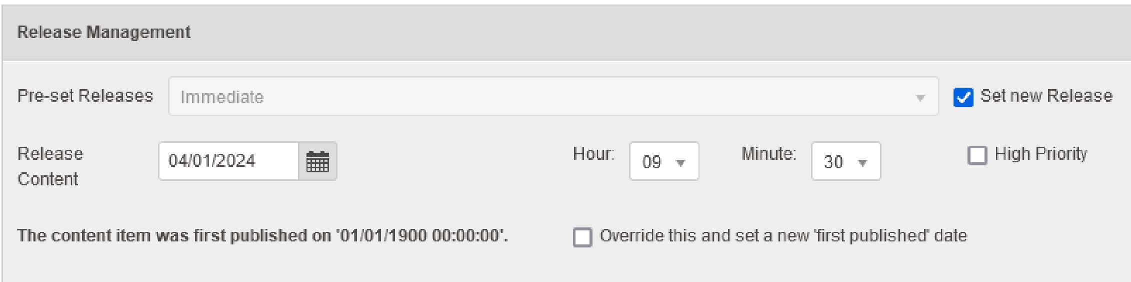
- Change the filename of a page – this will change the URL
- Change the menu name – what shows in your site menu
- Include in menu – the page will show in the site's menu structure
- Include in search – your page will show in search results
- Include in A to Z – if you have an A to Z setup within your site, this gives you the option to list it
- Include in site map – if you have a site map setup within your site, this gives you the option to list it

Set publishing schedule

This is useful for pages you want to go live out of normal working hours. The default shows 'immediate' which when authorised will publish to the live site immediately (depending on publishing queues).

To schedule publishing, follow these steps:

1. In edit mode, select the **Properties** tab from the content toolbar
2. Under **Release Management**, tick the **Set new Release** option
3. Choose the date and time you want to publish on the data picker next to **Release Content**
4. Tick 'Override this and set a new 'first published' date' if you want to change the published date
5. Do not tick 'High Priority'
6. After setting any of the above, save and submit your page



Scheduled publishing and submitting for approval

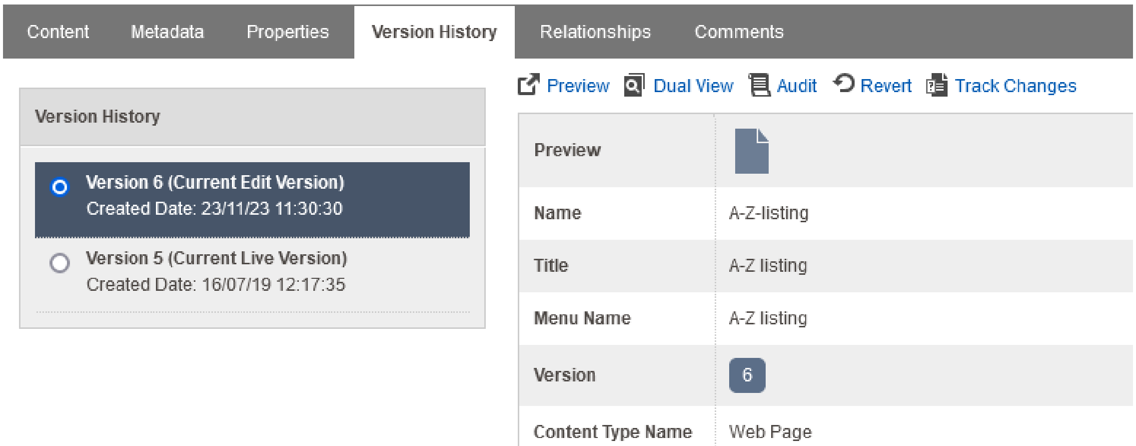
If you set a page to publish at a specific date/time, when your approver publishes it, the schedule will still be adhered to (unless they change this).

Version history

This is particularly handy if you want to revert to a previous version of a page (this isn't a permanent change as it can be undone).

1. In edit mode, select **Version History** from the content toolbar
2. Select which version you want to revert back to – you can preview the old version to check it's the one you need
3. Click **Revert**
4. The version you selected will now appear under your content tab
5. You will need to submit (and have your page authorised) again in order for the version to replace the existing one

Only pages that have been published will have a version to revert to. Just saving a page won't create a new version.



What You See Is What You Get (WYSIWYG) toolbar

When editing a page, the look and feel of the content is dictated and restricted to the styles and layout options available to you.

Within the editing area, you can format text using the WYSIWYG toolbar and apply various layouts using mini templates from the shared resources folder.

The WYSIWYG toolbar includes many functions you would see in Microsoft Word (for example, bold, italics, insert hyperlink). Hovering over an icon will show a title tag saying what it is for.

Copying and pasting

With a few exceptions, you can copy and paste most content from one page to another or from external sources directly into the editable areas.

We recommend that all content is pasted into Notepad before being pasted into the CMS. This will remove any additional formatting that Word has applied.

Paste

If content is pasted as normal text, all links will remain intact, but formatting (often bad formatting) will be copied across too. This often causes pages to behave unexpectedly with unusual formatting. It is your responsibility to ensure that text is reformatted appropriately.

When pasting as plain text:

- content will be unformatted and links will be removed
- text will be as one paragraph - you will need to go to the end of each paragraph and hit the enter key to create individual paragraphs
- go through and format your content from scratch, adding relevant headings, bullets and layouts

Workflow

Workflow is the term given for the process of saving a page through to it going live.

Save

After making changes, save your page by selecting save from the content toolbar. Saving won't publish your page, nor will it create a version. We advise saving your page regularly. Also, under save, is the option to create a copy if needed.

Preview

In edit mode:

1. On the content toolbar, select **Preview**
2. Ensure you have pop-ups enabled as preview will open a pop-up before opening your page preview

In the navigator:

1. Click the item you want to preview
2. Click **Preview** then **Test Popup**

Working off campus

You need to use the university's VPN to preview Contensis pages if you are working externally.

Submit

1. On the content toolbar, select **Workflow**
2. Submit or Submit With Message

All approvers of your site will receive an email notification to alert them that work has been submitted for approval (if they have email notifications on). If they decline your work, you will be notified via email.

Revoke

You can only revoke content (un-submit it) if an approver hasn't already declined or approved it.

This is handy if you have forgotten to do something and want to edit it again and re-submit it.

In edit mode:
1. On the content toolbar, select **Workflow**
2. Select **Revoke**

In the navigator:
1. Click on your page
2. Select **Edit**
3. **Revoke** and edit

Pass to another user
If you would like a fellow editor to add/change something before you submit it, this allows you to submit the page to another editor within the same group as you:

1. On the content toolbar, select **Workflow**
2. Select **Pass To Another User**
3. Select who you would like to pass it to
4. Add a message
5. Click **Pass To Selected User**

Check-in/check-out
When in edit mode, your page is checked-out. This means that other users can't edit it until you have checked it back in. Saving a page doesn't check it in. However, submitting a page does. Familiarise yourself with the various check-in/check-out states:

- Not checked out, you are free to edit it (depending on permissions)
- Checked out by you
- Checked out by someone else

Check-out
1. In the navigator, click on a page
2. Select **Edit**

If the page is already checked out, you will be displayed with a dialogue asking if you want to open as read only or be notified when the page has been checked in.

Check-in
In the navigator:
1. Click on the page you have checked-out

2. Select **Check In**

In edit mode:
1. On the content toolbar, select **Workflow**
2. Select **Check-In**

Other editors will now be able to access/edit your content.

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. It is best to always check pages back in when you are finished with editing them.

If you need to edit a page that is checked out by another user (who is out of the office), you can request for the page to be checked-in by contacting the web team or your unit web coordinator.

Status
The status of a page can be seen on the information screen.

1. In the navigator, click on your page/document/image
2. Select **Information**
3. The status can be identified by the red, amber and green traffic lights

Colour	Status	Description
Red		In the editing process and no version has been approved
Amber		Awaiting approval
Green		Live
Red and green		Has a live version and it is also currently in the editing process
Amber and green		Has a live version and is also awaiting approval of another version

Mini templates

The layout of a page is aided by mini templates. There are a number of these to choose from helping you achieve the best layout for your needs. Mini templates can be dragged and dropped into your content area to create columns etc. To insert a mini template:

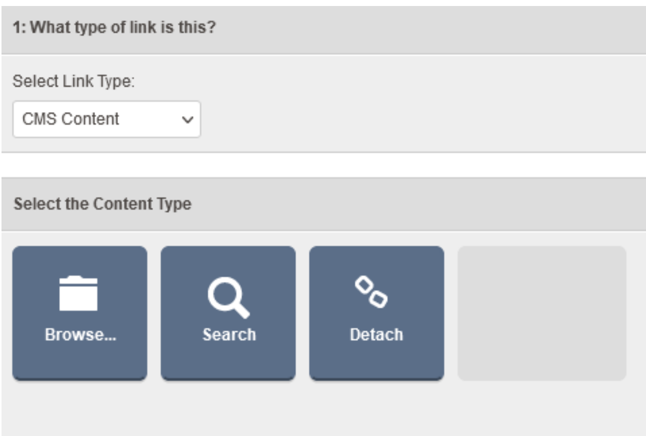
1. In the navigator, open /sharedResources/MiniTemplates
2. In edit mode, place your cursor where you want to add a layout
3. Press enter a few times to give yourself some space to work with
4. Click on the icon of the mini template in the navigator, hold and drag into your content area

Editable areas
Mini templates are outlined with a red dashed border. Editable areas within mini templates are outlined with a green dashed border.

Hyperlinks

Adding a hyperlink to a page

1. In edit mode, highlight the text that you want to become your link
2. Click on **Insert/Edit Link** from the WYSIWYG toolbar
3. Select **Content Type**, for example, CMS Content, external link or email (if you have access to a CMS page you want to link to, you should use the CMS Content option rather than putting in the complete URL – this means if the page moves, your link will still work)
4. Add your link and title text
5. Save



Editing an existing link

1. Highlight your link and select **Insert/Edit Link** from the WYSIWYG toolbar
2. Make your changes
3. Save selection

Removing a link

1. Place cursor on your link
2. Select the **Unlink** icon on the WYSIWYG toolbar

Important information about links

Opening in a new window – It is web best practice to have links open in the same window. Never set links to open in a new window.

Title text – This needs to explain what the link is/where it links to. Title text takes a link out of context and is mainly for the benefit of screen reader users who call up a list of links on a page and choose one they are interested in.

Context - If a link just says "click here" it doesn't make sense out of context. It should be clear where the link goes to.

Anchors

Anchors are used to jump to areas within a page and across multiple pages. If you have a long page split into sections, you can provide a list at the top of the page and link down to anchor points.

Insert an anchor

1. Place your cursor where you want to insert an anchor point (these are invisible)
2. Select the **Insert/Edit Anchor** icon on the WYSIWYG toolbar
3. Give the anchor a relevant name with no spaces or punctuation
4. **Save** selection
5. Repeat this for other anchors

Do not highlight headings/text to create anchors. Just add it to the beginning of the word/sentence.

Link to an anchor

1. Create your link text and highlight the text
2. Select the **Insert/Edit Link** icon on the WYSIWYG toolbar
3. Choose anchor on this page from the content type options
4. Give the anchor link appropriate title text

5. Select the anchor you want to link to
6. **Save** selection
7. Save and preview your page and test your link