

NIH Content Management System (CMS) Help Guide

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BACKGROUND

INTRODUCTION

Powered by Microsoft's Content Management Server, the NIH Content Management System (CMS) enables organizations to efficiently build, deploy, and maintain content-rich web sites for both public and non-public display. NIH CMS is a comprehensive solution for creating, publishing, and managing web content. NIH CMS includes easy-to-use tabs which enable content contributors to schedule content refreshes, manage workflow, and track revisions with the standard Internet Explorer Web Browser.

BENEFITS

Web content management is a critical component of any successful online strategy.

- Integrating Web content management can help organizations centrally and cost-effectively manage brand and design elements. By using NIH CMS, an organization can develop an integrated infrastructure for managing all types of content editing and publication processes.
- Built with flexibility in mind, NIH CMS can be used to deploy Internet sites, Intranet sites, and Extranet sites.

Once a site has been developed and deployed, business managers and Content Contributors can use Internet Explorer to create, publish, and manage their own web content. By reducing the need for ongoing IT site maintenance, NIH CMS lowers the overall cost of maintaining an Internet presence.

THE NIH CONTENT MANAGEMENT SYSTEM (CMS)

INTRODUCTION

NIH CMS follows a very structured, formalized process for managing and handling web content. Using CMS is very much like using a standard Windows-based word processing application; however, there is a common terminology that is associated with this application in particular. The next few sections will describe the common terminology and how the CMS infrastructure works to create an appropriate environment for dynamic content management.

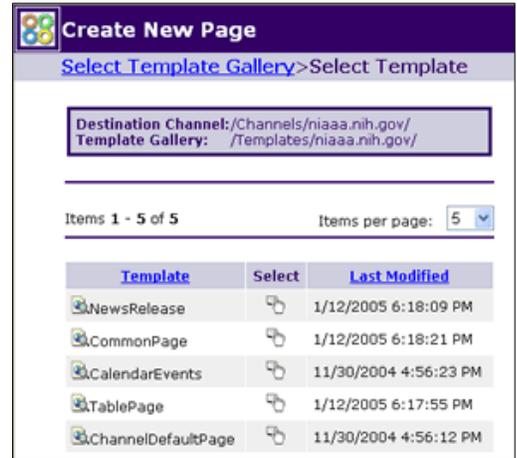
FEATURES AND FUNCTIONALITY

Content Contributor

Any user who is given permission to add, edit, delete, or a combination of functions as an Author, Editor, or Moderator, is defined as a content contributor. Refer to the roles section for more in depth information regarding each capacity.

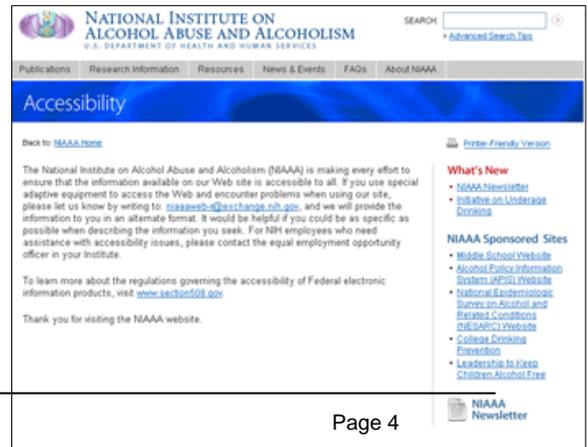
Templates (Page Model):

Templates provide the means for Authors to create a Web page without coding any HTML. A page template generates a form in a Web browser, where Content Contributors can add, edit, or delete content. The areas on the page where Content Contributors add content are called Placeholders. Placeholder properties on a template are assigned during development; therefore, a Template enforces a consistent design for a specific type of Posting (page) based on the rules that govern the specific Template. Some Templates are designed to accommodate any type of text- or image-based content, while others are programmed to display dynamically-generated preprogrammed groups of content. Templates are stored in the CMS Template Gallery.



Posting (Page):

A Posting is a collection of one or more CMS objects (templates, resources, and placeholders) that create a virtual HTML page. A Posting is created when unique content is added to a Template. A Posting also has a schedule: the Posting is visible to the subscribers browsing the CMS website only between the posting start time and expiration time.



The default schedule is to start immediately (on the hour) and never expire. Postings use the security settings of their Channel, and when editing with a Web Browser, it uses those of the Channel storing the page they are based on.

The Template that a Posting is based on is responsible for the HTML framework, layout, and the number and location of placeholders. Placeholders are responsible for storing content.

Channel (Folder):

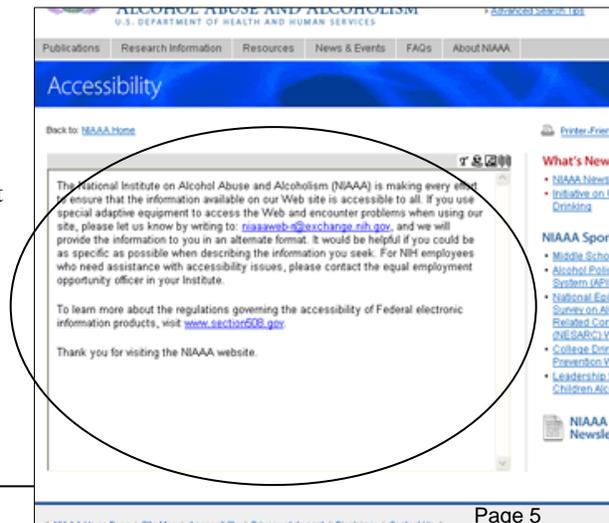
Channels are one of the most important parts of a CMS Web site as it provides the structure for organizing information into appropriate groups. The Channel hierarchy performs many of the same tasks that a folder/directory performs in a traditional file-based Web site. Channels organize content into logical groups and contain security permissions for both Content Contributors and End-Users viewing the site.

Channels differ from directories in several ways. Entire branches of a site can be moved (or renamed) without breaking links between Postings. Since navigation is system-controlled and based on the Channel hierarchy itself, all Posting links immediately reflect the revised structure of the site.



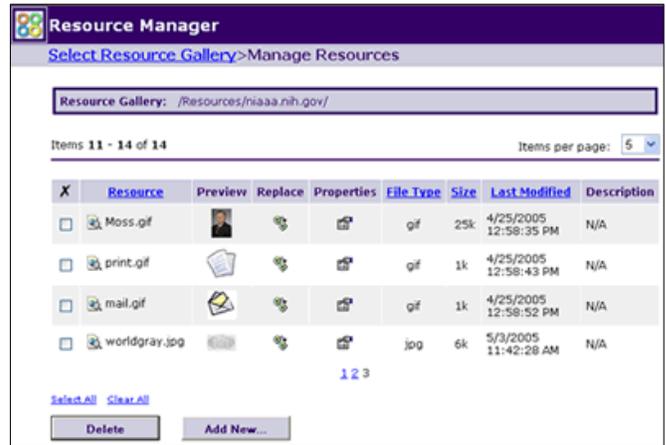
Placeholder (Content Field):

Placeholder is where content is added or edited on a Template. Different Placeholders exist for different types of content (text-only, image-only, all, etc). Placeholders can also be programmed to automatically format specific content in predetermined styles.



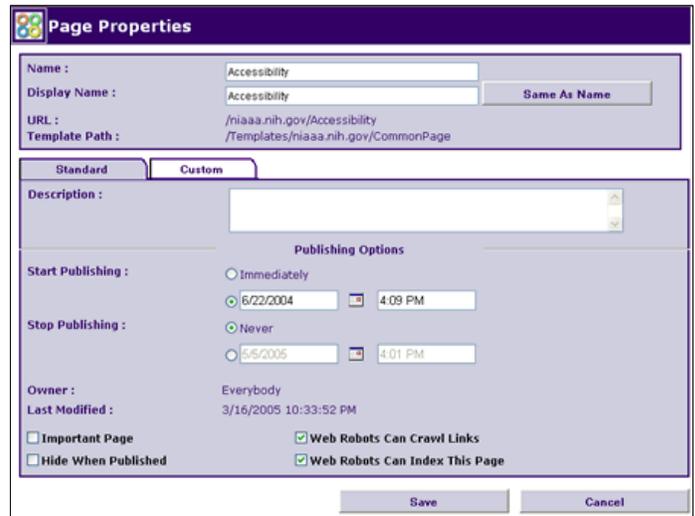
Resource (Document, Image, Misc File):

A Resource is any file that can be inserted in or attached to a Posting, whether it is a shared resource or a local resource from a Content Contributor’s desktop. A Resource can be a Word document, an Acrobat PDF, or even an image file. Shared Resources that will be used multiple times on an CMS website are stored in the Resource Gallery. Only Content Contributors with “Resource Manager” permissions can upload Resources to the Resource Gallery; however, all Content Contributors can typically view and access Resources that have already been placed in the Resource Gallery.



Page Properties:

A Posting’s attributes and certain dynamic behaviors are all accessible through the Page Properties dialog window (linked from the Edit Console). The main Page Properties section provides the ability to set the *Name*, and *Display Name*, as well as indicating the Posting’s URL and the Template that it is based on. The **Standard** and **Custom** tabs offer additional functionality and control.



Standard Functionality

Name: The *Name* value is the equivalent of a typical document filename. To avoid system errors, the naming of Postings should follow the standard CMS guidelines:

- o *No special characters or spaces (dashes and underscores ARE allowed, however);*
- o *Pascal naming convention (“My posting Title” becomes “MyPostingTitle”).*

Display Name: The “title” of the Posting that will typically appear at the top of the page, as well as in the text of any automatically-generated links within your CMS website.

- o *Special characters and spaces ARE allowed in the Display Name.*

Description: The user has the ability to add meta-tags to the page. This is the equivalent of the keywords area in a traditional HTML Page.

Start Publishing / End Publishing: The amount of time a posting will appear on a website. It is set to a default of immediately for start and never for end. The user should enter a time that is an hour out at a minimum from when they want their posting to be removed or added to a site if they use the timed option.

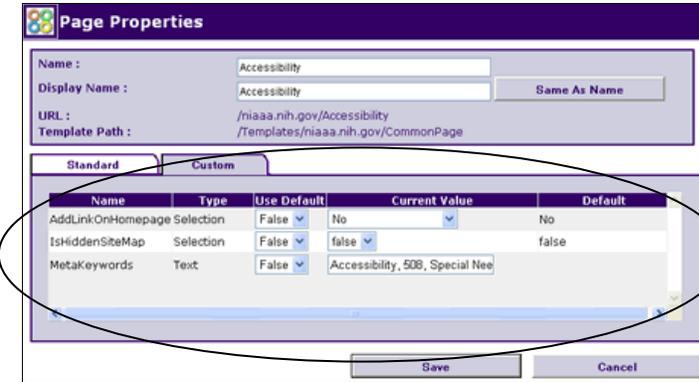
Important Page: Select this property to enable template designers to specify actions for an **Important** Page. For example, an important page could have flashing animation added to it, or could appear first in the navigation pane.

Hide When Published: Select this property to hide the channel or page from visitors on the live site. This may be useful when creating a summary page.

Web robots can crawl links (default is checked): Select this property to indicate that Web robots should follow links to other pages or channels.

Web robots can index this page (default is default): Select this property to indicate that Web robots should index the content in a given page or channel.

Custom Functionality



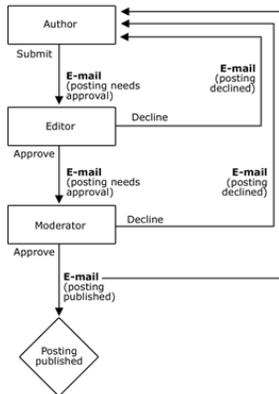
The **Custom** Tab gives Content Contributors the flexibility to control several dynamic aspects of the Posting, such as adding a link to the Posting on the website’s homepage, hiding the Posting from the dynamic sitemap, or inserting Meta Keywords. Custom Properties are based on a website’s specific requirements and are programmed during the development phase.

The custom tab, when selected, lists all the custom properties available for the specific template as designed by the developer for a given website. For further questions regarding custom properties, contact the CMS development staff as each site has a customized set of properties for their specific websites.

Workflow:

Workflow is the process by which an CMS Posting advances towards publication/production. Workflow consists of a series of procedures that begin with the initial Template selection and reach all the way to the Posting’s final Approval, upon which the Posting is *published*.

The following figure shows the e-mails that are sent using the workflow to the various user roles. Not all Websites include e-mail notification.



In CMS, the workflow steps are:

- An author selects a Template and adds content. The same Author then saves and submits the new posting.
- An Editor reviews the submitted Posting and either approves or declines the content.
- A Moderator (if present or included as part of workflow assignment) gives final approval for the scheduling of the content and positioning of the page of the Website.
- An End-User also called a guest or Subscriber, can view the published page on the Web site.

Roles & Responsibilities



User Roles

<u>Role</u>	<u>Rights</u>
Author	<ul style="list-style-type: none"> ○ Able to Create New Postings based on standard Templates. ○ Creates and Edits new and existing Postings. ○ Submits edited Postings to Editors for Approval. ○ Can Delete Postings that are “self-owned”. ○ Views and uses shared Resources from the Resource Gallery.
Editor	<ul style="list-style-type: none"> ○ Able to Create New Postings based on standard <i>and</i> Admin-level Templates. ○ Edits, Approves, Declines, and Deletes Postings submitted by Authors. ○ Views and uses shared Resources from the Resource Gallery.
Resource Manager	<ul style="list-style-type: none"> ○ Can Add, Replace, and Delete shared Resources in the MCMS Resource Gallery (image/document management).
Moderator	<ul style="list-style-type: none"> ○ Able to Create New Postings based on Author- <i>and</i> Admin-level Templates. ○ Edits, Approves, Declines, and Deletes Postings, regardless of who owns them. ○ Views and uses shared Resources from the Resource Gallery. ○ Approves and declines Page Publishing Properties.
Subscriber	<ul style="list-style-type: none"> ○ Browses the site to view the contents of Postings and Channels to which the Subscriber has rights.

Edit Console

Switch to Edit Site: Expands the Edit Console and switches from Live Mode to Edit Mode.

Switch to Live Site: Collapses the Edit Console and switches from Edit Mode to Live Mode.

Production Manager: Lists all Postings that are currently in production (Postings that have been created but have not been published on the site).

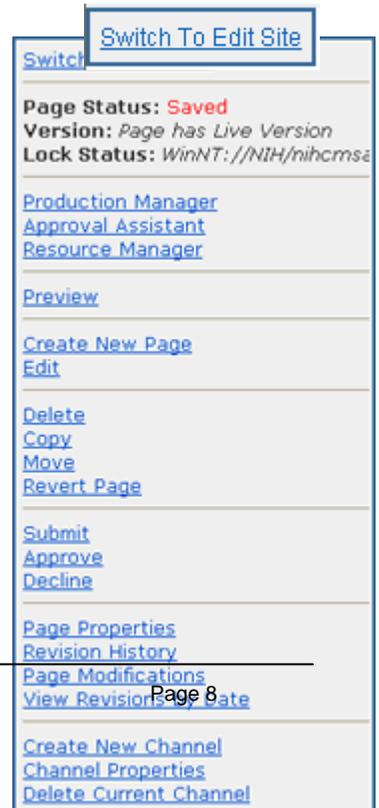
Approval Assistant: Lists all self-submitted Postings that are currently waiting for approval by an Editor.

Resource Manager: Opens the Resource Gallery for the addition, updating, and deletion of Resources (only available to Resource Managers).

Preview: Allows Content Contributors to see non-approved changes to the Posting in a Live/approved view state.

Create New Page: Creates a new Posting in the *current* Channel. When selected, the “Template Gallery” will open for Template selection.

Edit: Allows Content Contributor to add/delete/edit Placeholder content.



Delete: Completely removes the *current Posting* from the website. *Deleted Postings are non-recoverable!*

Copy: Copies the current Posting to a new user-selectable destination within the website.

Move: Moves the current Posting to a new user-selectable destination within the website.

Revert Page: Returns the current Posting back to its original state before the most recent changes were saved.

Submit: Submits the Posting to an Editor or Moderator for approval and publishing.

Approve: Approves the current Posting and publishes it to the production site.

Decline: Sends the Posting back to its most recent Content Contributor for additional editing. Used when a Posting is not satisfactory for publishing.

Page Properties: Opens the Page Properties dialog window, where the current Posting's attributes and behaviors can be accessed.

Revision History: Lists all of the current Posting's revisions. Content Contributors can compare multiple versions of the current Posting with the content changes clearly marked.

Page Modifications: Displays when the most recent content changes were made to the current Posting and identifies the Content Contributor who made them.

View Revisions by Date: Displays a snapshot of the current Posting at any past date, in its then-current state.

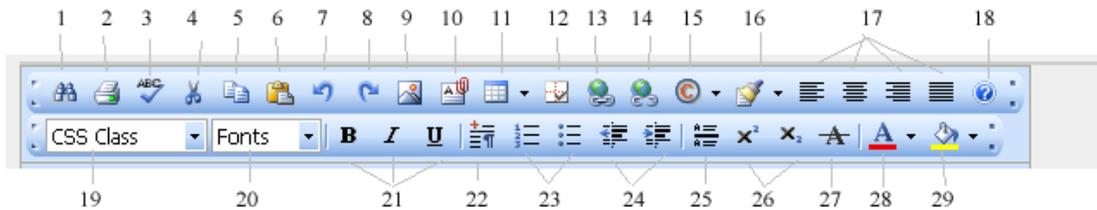
1.

CONTRIBUTING CONTENT USING THE CMS EDITOR TOOL

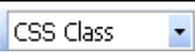
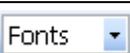
INTRODUCTION

The CMS editor tool enables the content contributor to perform tasks such as editing tables, hyper linking, style issues as it relates to text formatting/style sheet properties, text management such as the ability to add symbols, special characters etc. The next section details the toolbar functions.

THE CMS EDITOR TOOLBAR



- | | | | |
|---------------------|-------------------------|------------------------|-----------------------------|
| 1. Find and Replace | 9. Image Manager | 17. Text Justification | 25. Horizontal Line |
| 2. Print | 10. Document Manager | 18. Help | 26. Superscript / Subscript |
| 3. Spell Check | 11. Table Manager | 19. Formatting | 27. Strikethrough |
| 4. Cut | 12. Toggle Table Editor | 20. Fonts | 28. Text Color |
| 5. Copy | 13. Hyperlink | 21. Text Styles | 29. Text Background |
| 6. Paste | 14. Remove Hyperlink | 22. New Paragprah | |
| 7. Undo | 15. Special Characters | 23. List/Bullets | |
| 8. Redo | 16. Format Stripper | 24. Indent/Outdent | |

Button	Function
	Find and Replace: Allows the user to find a word or phrase in a placeholder. It also allows the user to replace all instances of it if selected.
	Print: Allows the user to print the contents of one or more placeholder in authoring mode.
	Spell Check: Allows the user to check one or more placeholders for spelling errors only.
	Cut: Cut removes text, images etc from the selected area in a placeholder.
	Copy: Copy allows you to copy content to the clipboard and transfer content within one or more placeholders.
	Paste: Allows the user to place the content copied to the clipboard using the copy button into the placeholder(s) of choice.
	Undo: Allows the user to undo the immediate change they made in a placeholder.
	Redo: Allows the user to revert back to the immediate addition they made in a placeholder.
	Image Manager: Allows a user to place an image into a placeholder from the local desktop (by storing it as a single instance in the database) or pulling a document from the resource gallery.
	Document Manager: Allows a user to create a link to a document by either pulling it from the local desktop (by storing it as a single instance in the database) or pulling a document from the resource gallery.
	Table Manager: Allows the user to create one or more tables in a placeholder.
	Toggle Table Editor: Allows for various modifications to table properties.
	Hyperlink: Allows a user to create an internal link within the CMS environment or to a third party website.
	Remove Hyperlink: Allows the user to undo a link which they created in a placeholder.
	Special Characters: Allows the user to enter special characters such as copyright, trademark, or registered symbols.
	Format Stripper: Offers the user a variety of tools to clean up and organize the text without any excessive markup in the placeholders.
	Text Justification: Justifies the text as left, center, right, or justified all.
	Help: Answers commonly asked questions about the toolbar and how to use it.
	Formatting: Includes the ability to change font style and size based on standard configuration or style sheet selections.
	Fonts: A listing of all the available fonts that can be used in a given Placeholder.
	Text Styles: Bold: Allows the user to make selected text bold. Italic: Allows the user to make selected text italicized. Underline: Allows the user to make selected text underlined.
	New Paragraph: Allows a user to begin a new paragraph in a placeholder without using the return key or space bar. This allows for HTML tagging instead.
	List/Bullets: Allows the user to either organize a selected area of text by a list format or as bullets.
	Outdent / Indent: Either indents a selected block of text in a placeholder or outdents a selected paragraph/block of text in a placeholder.
	Link/Bullets: Allows the user to either organize a selected area of text by a list format or as bullets.

	Horizontal Line: Allows the user to create a horizontal line in their placeholder. Similar to that of the tag <code><hr></code>
	Superscript/Subscript: Allows the user to format their text as subscript of superscript in the HTML placeholder.
	Strikethrough: Allows the user to put a line through any text they have in a standard HTML placeholder.
	Text Color: Allows the user to change the color of text.
	Background Color: Allows the user to change the color of the text background for selected areas only. This does not change the placeholder background color.

CREATING A NEW POSTING

1. Navigate to the Channel in which you would like to create a new Posting.
2. Enter Edit Mode by selecting “Switch to Edit Site” in the Edit Console (bottom left).
3. In the newly-expanded Edit Console, click on the link that reads “Create New Page”. This will launch the Template Gallery dialog window.
4. Select your desired Template Gallery, most likely the default “niaaa.nih.gov” Gallery. (*only Editors and Moderators have access to Templates in the “Admin” Template Gallery*).
5. Select the Template you would like to use as the basis for your new Posting (a preview version is also available by clicking on the left-hand image of the magnifying glass).
6. Enter the desired content (ie, text) into the Placeholder(s).
7. When you have finished entering content into the Placeholder(s), select “Save New Page” from the Edit console.
8. Enter values for the *Name* and *Display Name*. To avoid system errors, the name value should follow the standard CMS guidelines:
 - o *No special characters or spaces (dashes and underscores ARE allowed, however);*
 - o *Pascal naming convention (“My posting Title” becomes “MyPostingTitle”).*
 - o **Special characters and spaces ARE allowed in the Display Name.*
 - o **Optional:** Click on the “Page Properties” link in the Edit Console to review and modify (if necessary) the Page Properties for this Posting.
9. **Authors:** Submit the page for Editor approval by clicking on the “Submit” link in the Edit Console.
Editors/Moderators: If the page is ready to be published, click on the “Approve” link in the Edit Console.

EDITING AN EXISTING POSTING

1. Navigate to the Posting which you would like to edit.
2. Enter Edit Mode by selecting “Switch to Edit Site” in the Edit Console (bottom left).
3. In the newly-expanded Edit Console, click on the link that reads “Edit”.
4. Modify, delete, or replace the existing Placeholder content as desired.
5. **Optional:** Click on the “Preview” link in the Edit Console to view the Posting in a virtual Live Mode.
6. When you have finished entering content into the Placeholder(s), select “Save And Exit” from the Edit console.
7. **Optional:** Click on the “Page Properties” link in the Edit Console to review and modify (if necessary) the Page Properties for this Posting.
8. **Authors:** Submit the page for Editor approval by clicking on the “Submit” link in the Edit Console.
Editors/Moderators: If the page is ready to be published, click on the “Approve” link in the Edit Console.

DELETING THE CURRENT POSTING

In the extremely rare condition that a Content Contributor needs to delete a Posting, follow the steps below. Please keep in mind that once a Posting is deleted from the system, it is *unrecoverable*.

1. Navigate to the Posting that needs to be deleted.
2. Enter Edit Mode by clicking “Switch to Edit Site” in the Edit Console.
3. Click on “Delete” in the expanded Edit Console.
4. When prompted “*Deleting the page will remove it permanently from the system. Continue?*,” select either “OK” or “Cancel”.

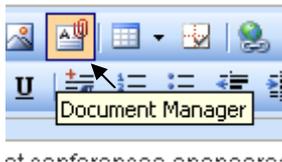


Note: All manually-created links to the deleted Posting will be deactivated. However, text representations of those links will remain. Conversely, all dynamic (automatically system-generated) links to the deleted Posting AND associated link text will be removed completely.

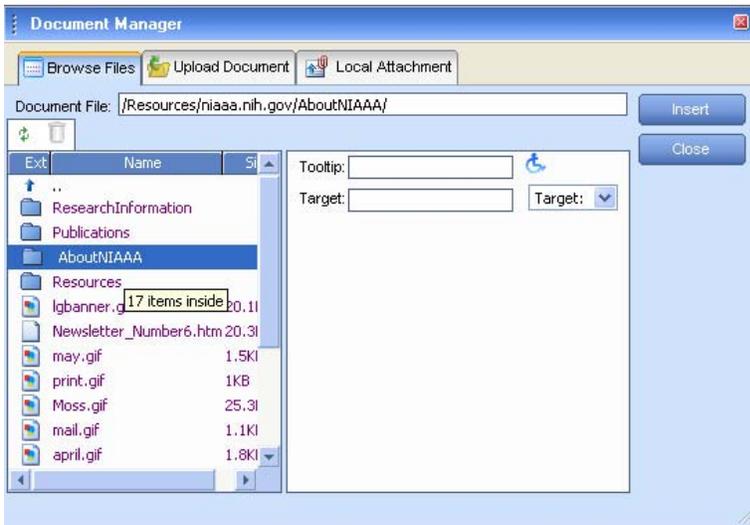
MAINTAINING THE RESOURCE GALLERY

On any Posting, enter Edit Mode by selecting “Switch to Edit Site” in the Edit Console (bottom left).

In the newly-expanded template, click on the button that reads “Document Manager.” This will launch the “Select Resource Gallery” dialog window.



Navigate through the expandable folder interface and select your desired Resource Gallery. This will launch the “Resource Gallery” dialog window:

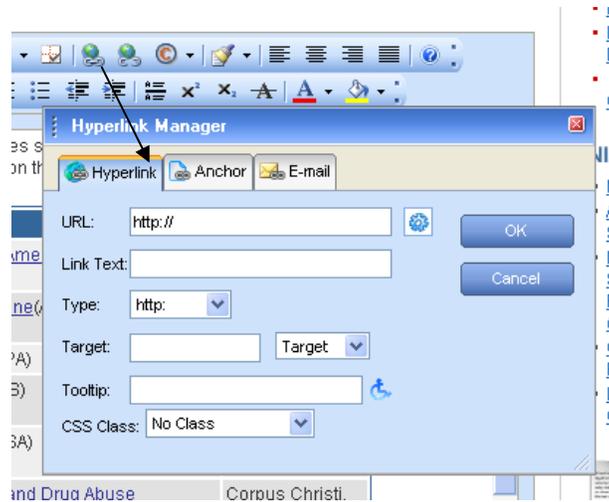


From the Resource Preview list, you can Add (Upload Document), Delete, Modify the properties of, or Replace any Resources as desired. You can also upload a document from as a local attachment (single instance for website without being stored.)

When complete, exit the Resource Manager by simply closing the Document Manager window.

CREATING A HYPERLINK

1. Navigate to the Posting which you would like to edit.
2. Enter Edit Mode by selecting “Switch to Edit Site” in the Edit Console (bottom left).
3. In the newly-expanded Edit Console, click on the link that reads “Edit”.
4. Within a Placeholder, highlight the section of text which you would like to turn into a link.
5. Click on the “Edit Hyperlink” button in the top row of the Placeholder Editing Toolbar. The “Edit Hyperlink” dialog window will pop up:



- a. ***For links to webpages outside of your CMS website:*** Type the URL address into the “URL” field (see image above). Next, from the “Target” dropdown menu you should select “_blank”. ***As a standard, all third-party/external links should be forced to open in a new browser window.***

OR

For links to Postings within your CMS website: Click on the “Browse...” button and the “Internal Links” dialog window will appear (see image below). Navigate to the desired target Posting or Channel and click on it. Notice that the lower “Selected Link” textbox now displays the URL of the Posting or Channel you selected. Click the “OK” button to close this window and return to the “Edit Hyperlink” window. If you are satisfied with the default link properties, then click “OK” again to close this window and return to the Posting in Edit Mode. You will notice that the highlighted text has now become a web link.



6.

7.

OR

For anchor links within a Posting in your CMS website: It's a two step process. First go to the target area of the page for the anchor. Create a link using Link Manager using the "anchor" tab selection. Enter the name of the anchor in the Name box, for example "nameoftarget". Then go to the linking area. Create a link using Link Manager. In the URL box, delete the "http://" and enter "#nameoftarget".

Optional: Click on the "Preview" link in the Edit Console to view the Posting in a virtual Live Mode.

If you are satisfied with the current Posting content, click "Save And Exit" in the Edit Console.

Authors: Submit the page for Editor approval by clicking on the "Submit" link in the Edit Console.

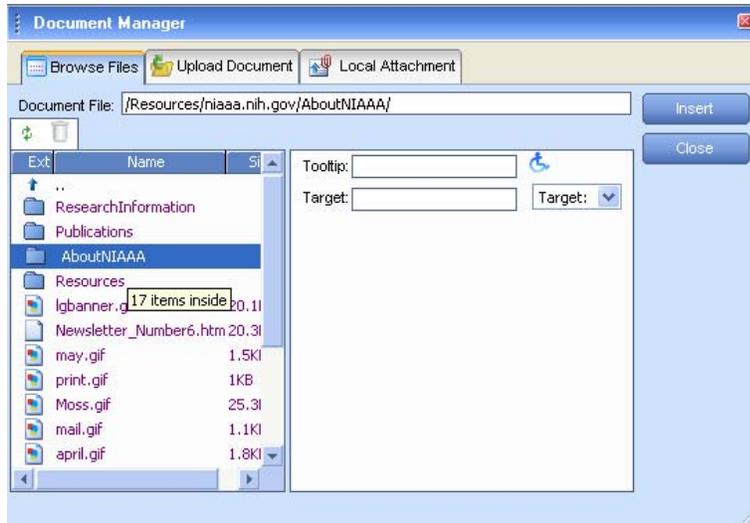
Editors/Moderators: If the page is ready to be published, click on the "Approve" link in the Edit Console.



Note: All hyperlinks within your site should be created in the manner above. This ensures that, should a Posting be relocated, your content will automatically reflect the new URL address.

CREATING A LINK TO A RESOURCE

2. Navigate to the Posting which you would like to edit.
3. Enter Edit Mode by selecting “Switch to Edit Site” in the Edit Console (bottom left).
4. In the newly-expanded Edit Console, click on the link that reads “Edit”.
5. Within a Placeholder, highlight the section of text which you would like to turn into a link to a Resource.
6. Click on the “Document Manager” button in the top row of the Placeholder Editing Toolbar. The “Document Manager” dialog window will pop up:



If you are linking to a Resource from the Resource Galley, select “Browse File”. Otherwise, select “Local Attachment”.

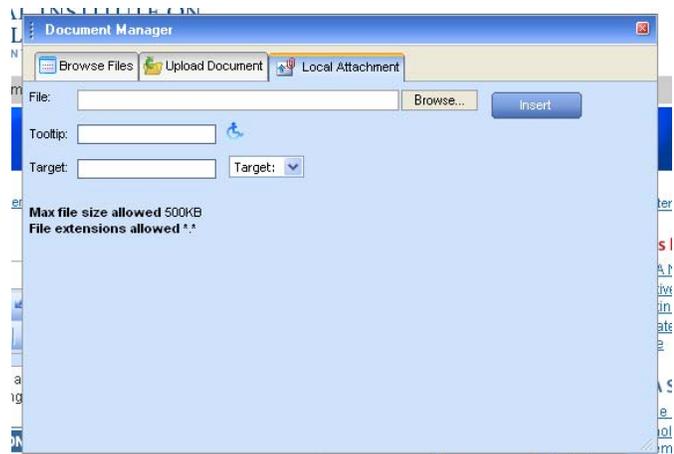
For links to Shared Resources in the Resource Gallery:

In the “Browse File” tab window, navigate the folders until you find your desired Resource Gallery. Select your desired target Resource, then edit the link text and click the “Insert” button in the following window.

OR

For links to Local Resources that are not stored in the Resource Gallery:

Click on the tab “Local Attachment” dialog window will appear. Navigate to the desired target Resource, highlight it, then click on the “Open” button. Type in your preferred link *Display Text and Target*. Then, click the “Insert” button.



Optional: Click on the “Preview” link in the Edit Console to view the Posting in a virtual Live Mode.

If you are satisfied with the current Posting content, click “Save and Exit” in the Edit Console.

Authors: Submit the page for Editor approval by clicking on the “Submit” link in the Edit Console.

Editors/Moderators: If the page is ready to be published, click on the “Approve” link in the Edit Console.