# LSE Training Guide for Editors

Version 8.3

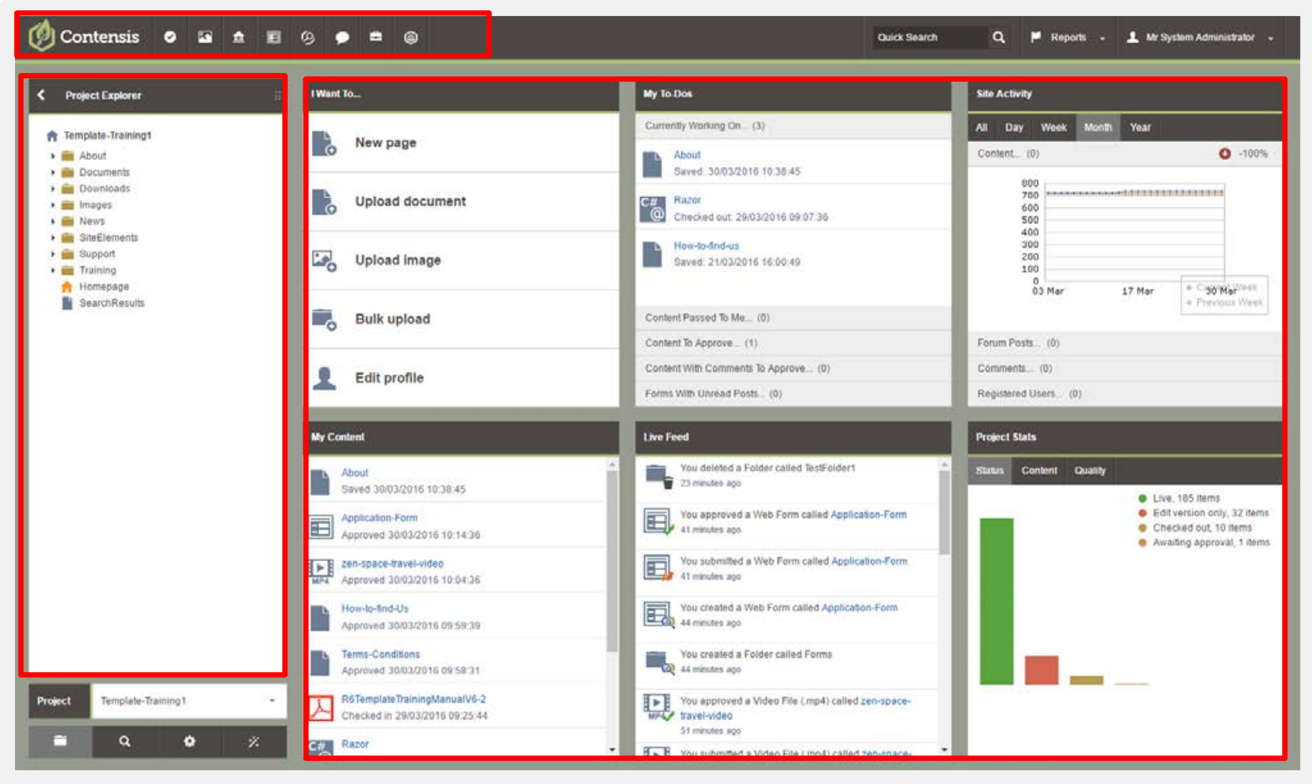
30.03.16

# THE INTERFACE

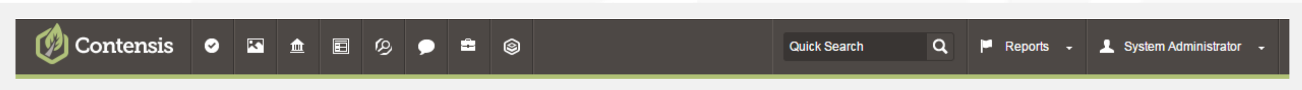
## Overview

In its basic form, the Contensis workspace is divided into three main areas:

1. The Toolbar
2. The Project Explorer
3. The Workspace Area




## The Toolbar



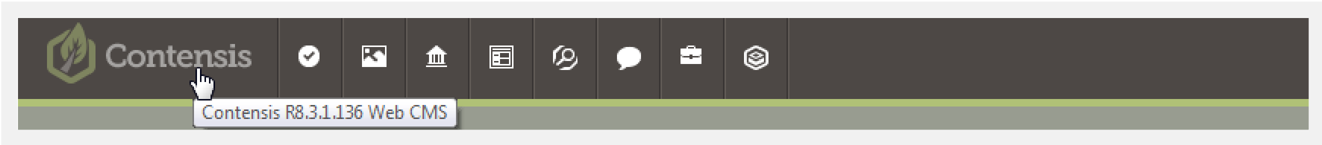

The top toolbar is visible at all times whilst logged in to Contensis.

The Top Toolbar provides a variable number of links, some of which LSE does not use. These allow you to:

- see content awaiting approval
- access the image library
- change your own User Profile details
- access the Management Console
- view and manage form posts
- log out of Contensis

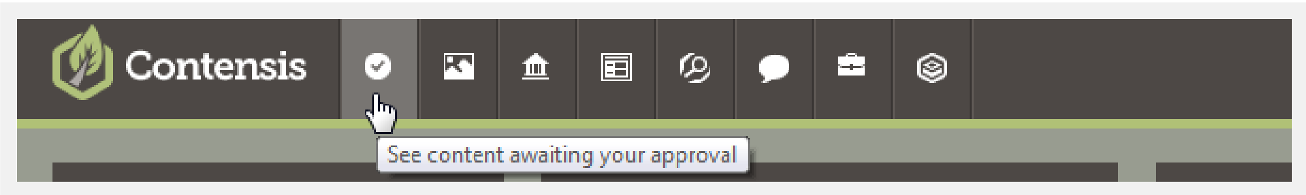
The toolbar also displays details of the 'logged in as' username, a quick search facility, and a dropdown reporting facility. These are explained in further detail below.

## Contensis Version Information



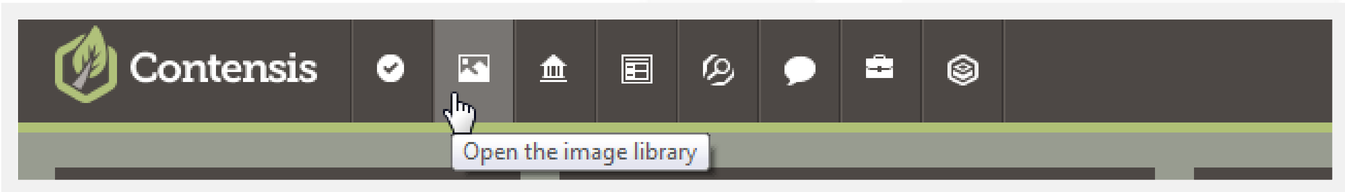

Placing the cursor over the text or icon will display title text showing the version of Contensis that you are currently using. The new website uses 8.3, and the old LSE website uses 8.1. There are some differences in function, so even if you are familiar with 8.1, it is worth spending time reading this guide to familiarise yourself with the functions available in 8.3.

## Content Awaiting Approval




This button displays a list of submitted content that is awaiting approval and publishing. If you are an approver of content, the list will show content for you to approve, which you can do from here.

## Image Library




The Contensis Image Library can be quickly accessed by clicking this button, allowing users to see all images in the current Project. It is also an image editing tool, allowing users to make changes to existing images e.g. resizing, cropping, applying effects etc.

## Form Posts


Displays a list of forms that are used in the current project, and provides options to carry out management related tasks for each form.

## Marketplace


This is an area intended for Developers, allowing them to share templates, web controls, content and code snippets between installations of Contensis. You will not need to access this area.

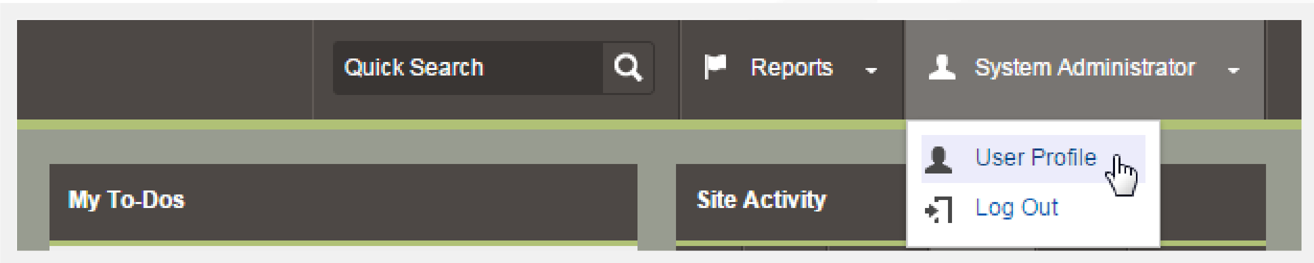
## Right-hand Side of Toolbar


To the right, the toolbar displays the following:

- A 'quick search' facility with a dropdown area displaying the top ranked results based on the search term entered.
- A reports dropdown facility, allowing you to view a number of different reports for content that relates to you as a user of Contensis e.g. 'Content Edited By Me This Week'.
- Logged in user name is displayed e.g. System Administrator

Clicking on the logged in user name gives access to the user profile, described below.

## User Profile



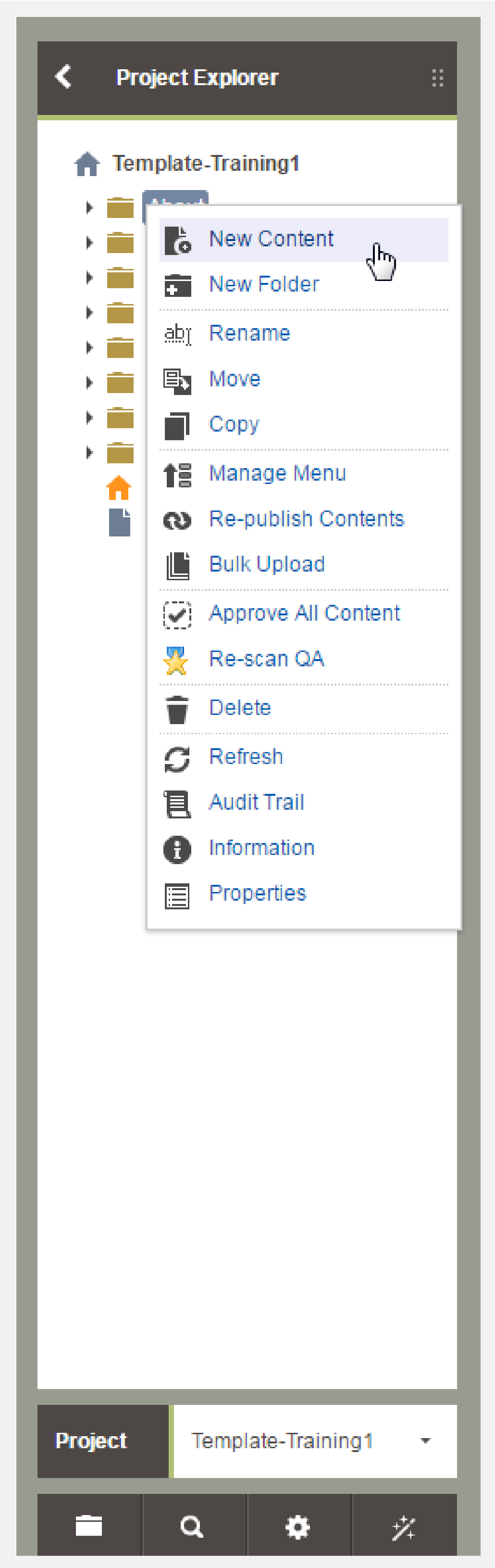

Use this button to view or edit your own profile details.

## Logout

Allows the currently logged in user to log out of Contensis. If the user has content checked out it will prompt the user to check in their content, before finally logging them out.

# The Project Explorer

The Project Explorer displays your project tree menu, allowing you to access any available project and the content associated with that project.




Key features:

- **Folder Based Menu**
  The project tree reflects the current structure of the project and allows full control of content location, folder properties and page channels.
  Note: The order in which Folders display here can be either Alphabetical, or in Menu Order, as it displays on your live site menu. See Changing Project Explorer View below.

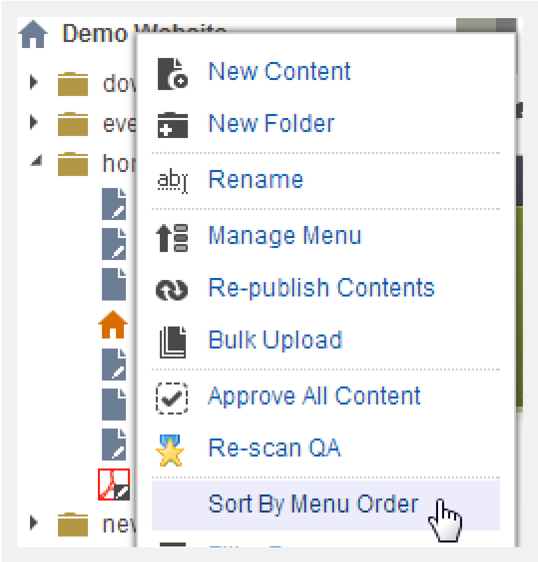
- **Left or Right Click Functionality**
  Clicking on a folder or content item within a folder displays a context menu with options relevant to the current status and item selected (see screenshot on left).

- **Project Selector**
  Left-click to list all available projects which may include websites, intranets, extranets etc. Selecting a project you will refresh the view to display the associated project tree. Projects can be managed as completely separate entities allowing multiple delivery channels utilising different display methods and settings.

- **View Selectors**
  Located in the footer area, these buttons allow users to toggle views between the following:

  - Project Folders
  - Project Search
  - Management Console
  - Wizards

## Changing Project Explorer View



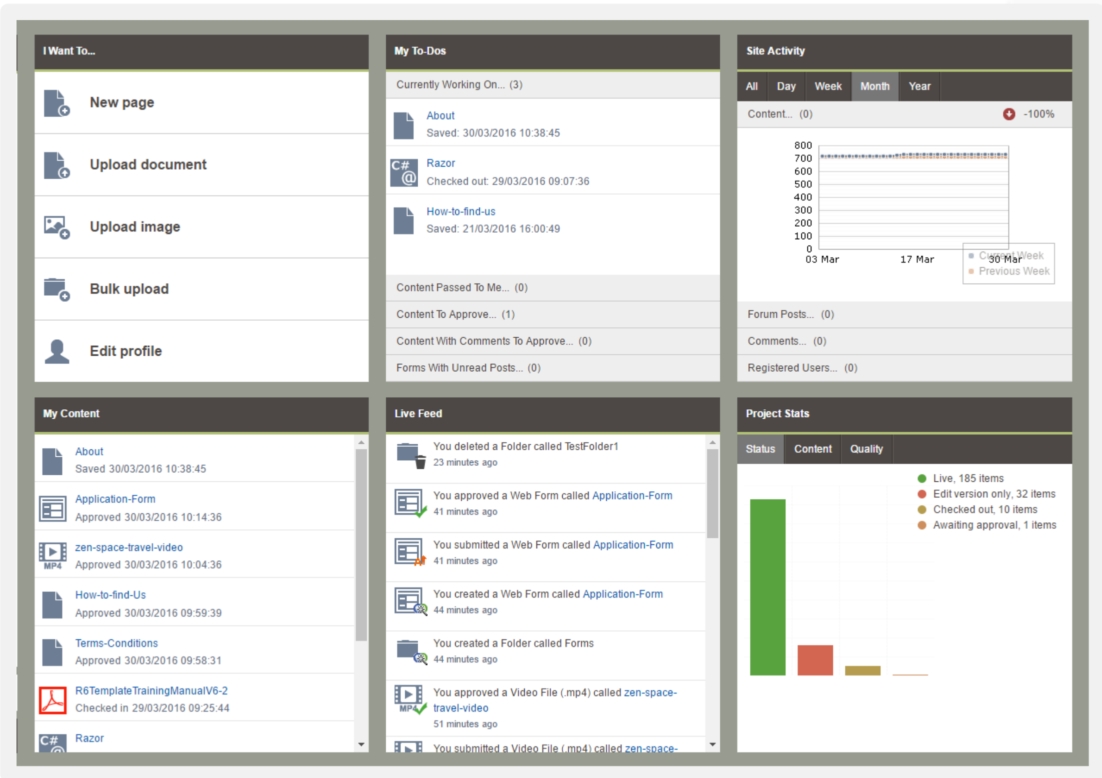

As mentioned above, Contensis allows users to view the Project Explorer tree in either of the following views:

- Alphabetical
- Menu Display Order

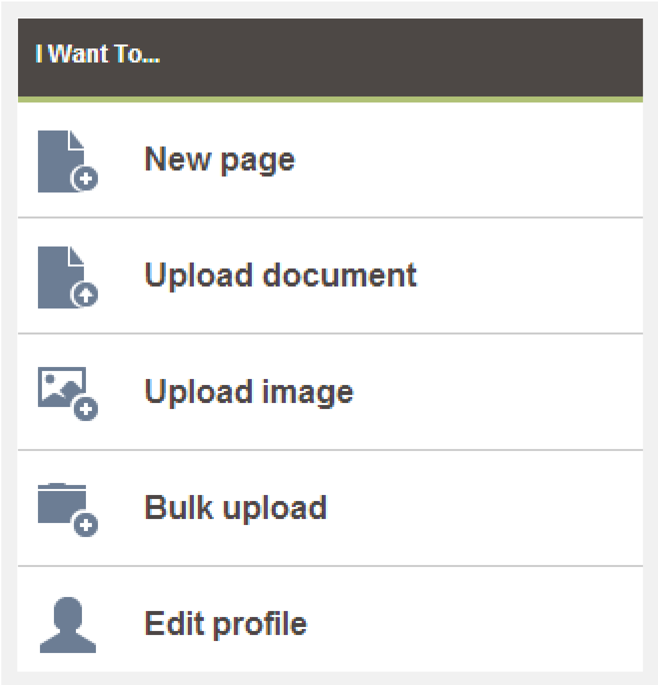
By right-clicking on the Root, the context menu will display either '**Sort by Menu Order**' or '**Sort Alphabetically**', depending on the current view, and clicking one of these will then change to display the alternative view.

## The Workspace Area

The Dashboard area contains six main areas, and these can be used to quickly find summaries of key information related to your work in Contensis. These are dealt with one by one below.



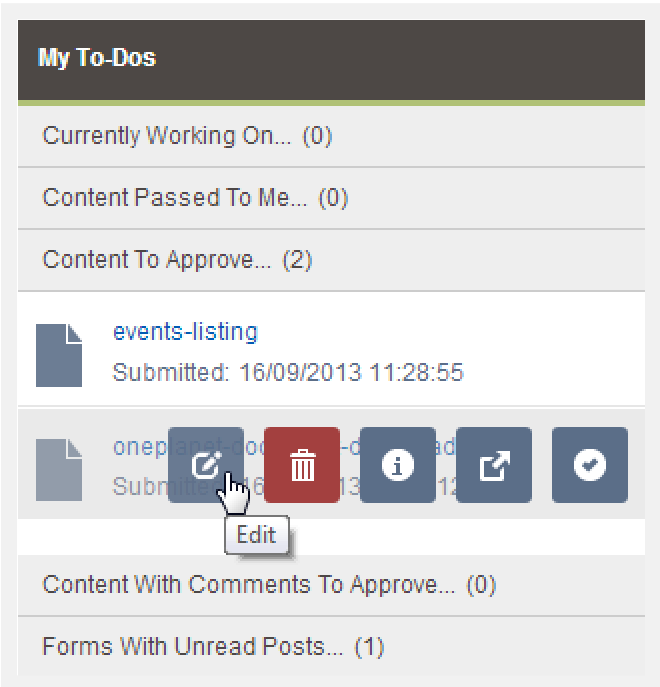
## I Want To…




From here, using wizard functionality where applied, you can:

- Create a new webpage
- Upload a document (e.g. Word doc or PDF) or an image
- Bulk import - upload a zipped file containing multiple documents or images
- Edit your own user profile in Contensis

## My To-Dos



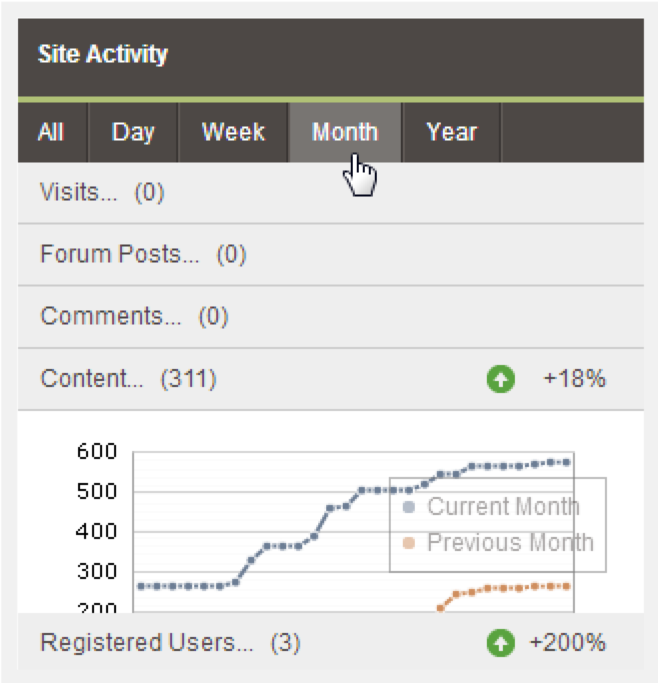

This section has expandable/collapsible areas where you can view information relating to your role. These are as follows:

- Currently Working On...
- Content Passed To Me...
- Content To Approve...
- Content With Comments To Approve...
- Forms With Unread Posts...

Where items are listed, placing the cursor over an item displays a toolbar with button options (according to permissions) to do the following:

- Edit
- Delete
- View Information
- Preview
- Approve

## Site Activity

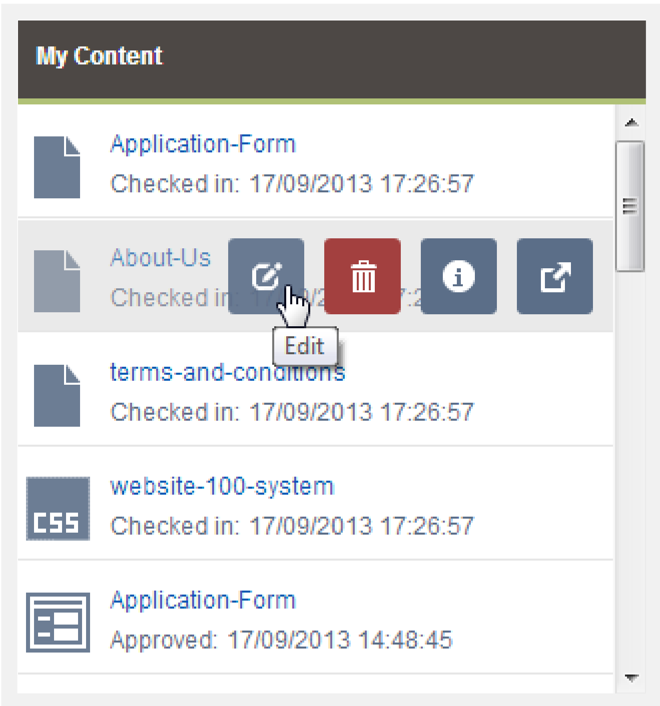



This area displays categorised information based on activity for the website. These categories are as follows:

- Visits
- Forum Posts
- Comments
- Content
- Registered Users

This display also shows the trends indicating increased/decreased or static movement and allows for comparison by day, week, month or year.

## My Content



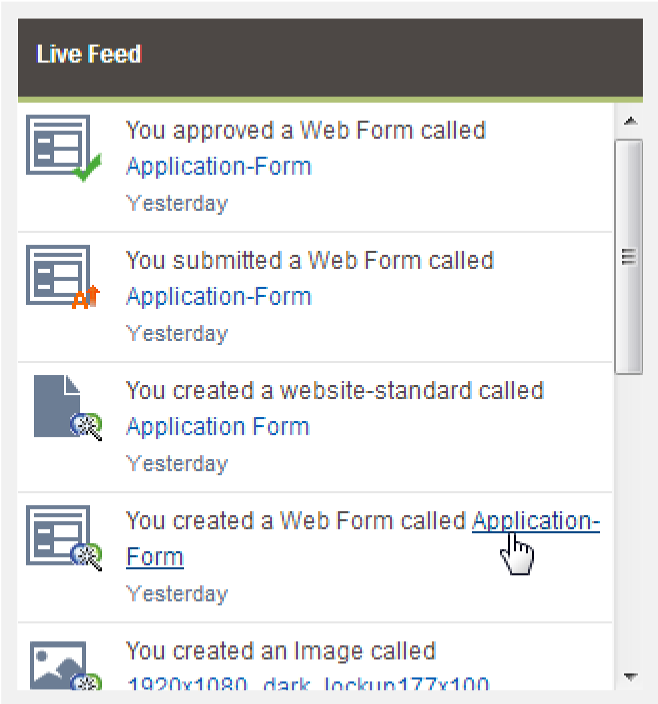

Here you can see details for content that relates directly to you as a user of Contensis. The list shows the title of the document and below that, the associated workflow task that has been performed. These include:

- Saved
- Checked In
- Submitted
- Checked Out

Where items are listed, placing the cursor over an item displays a toolbar with button options (according to permissions or status) allowing you to do the following:

- Edit
- Delete
- (view) Information
- Preview
- Check-in

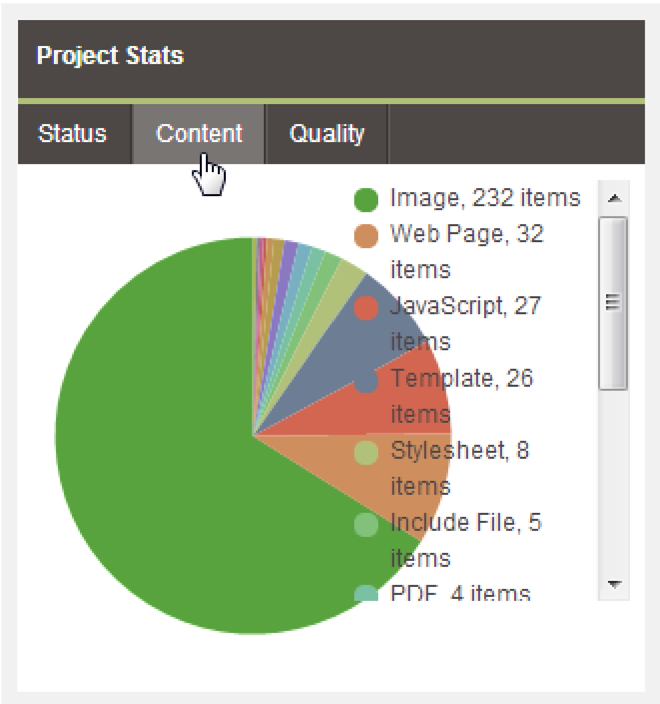
## Live Feed




This is a 'live' feed displaying workflow actions as they happen in real time. It continually displays and updates a list of actions that have taken place, and is a scrollable feature allowing you to scroll back chronologically.

Note: the display includes links, as indicated in the screenshot. Clicking on a link will open a window, showing a preview of that item.

## Project Stats




This is a tabbed graphical feature categorised into the following areas:

- **Status** (showing items that are live, in edit mode or checked out)
- **Content** (a breakdown of Content Types making up the Site)
- **Quality** (Content that has Passed, Failed or Not Validated Quality Assurance Checking)

# WORKING WITH WEBPAGES & CONTENT TYPES

Before you can start working with Contensis, it will be necessary for a System Administrator to configure areas of the system for you. This will normally include the following processes:

- Creation of content folders
- Setting up permissions for access to one or more project folders
- Assignment of Page Templates and Content Types for individual folders
- Assignment of permissions for individual Page Templates & Content Types at each folder level.

## Identifying Content Types

| | | |
|---|---|---|
| Database | Microsoft SQL Database Connection | cdb |
| FLV Video | Video File (.flv) | flv |
| Form | Web Form | frm |
| HTML | HTML File | htm |
| Hyperlink | Link to a CMS file or an External Website | ink |
| Image | Image | jpg,gif,bmp,png,jpeg |
| MP4 Video | Video File (.mp4) | mp4 |
| MS Excel | Microsoft Excel Spreadsheet | xls,xlsx |
| MS PowerPoint | Microsoft PowerPoint Presentation | ppt,pps,pptx |
| MS Word | Microsoft Word Document | doc,docx |
| MS Word Template | MS Word Template | dot,dotx |
| Online Poll | Online Poll | cpo |
| PDF | Adobe PDF | pdf |
| Stylesheet | Cascading Stylesheet | css |
| Template | Page Template | tpl |
| TXT File | Text Document | txt |

There are a number of different content types that can be used with Contensis. Each content type has its own associated icon, and these are widely used in a number of areas within Contensis.

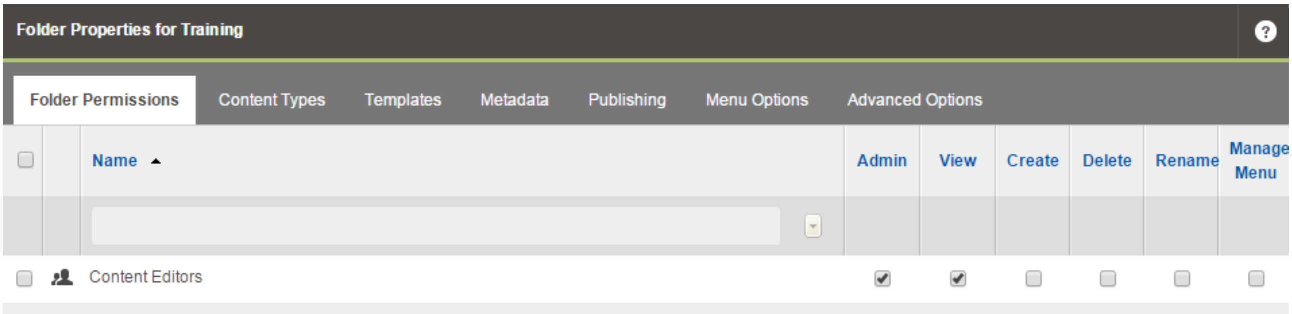
Note that a given content type can contain more than one file type. For example, the 'Images' content type includes the following file types:

- .Jpg
- .Gif
- .Bmp
- .Png
- .jpeg

The same applies to other content types too. The screenshot below shows some of the more commonly used content types and their associated icons.

## Folder Administration Permissions

If you have folder ‘Admin’ permissions, as indicated in the following screenshot, and the content type is not already assigned to the folder, you will now be able to assign additional content types to the folder should you wish to do so. Note that if you do not have administration rights for a certain folder, a Systems Administrator will need to assign content types to the folder on your behalf.




# DELETING EXISTING CONTENT

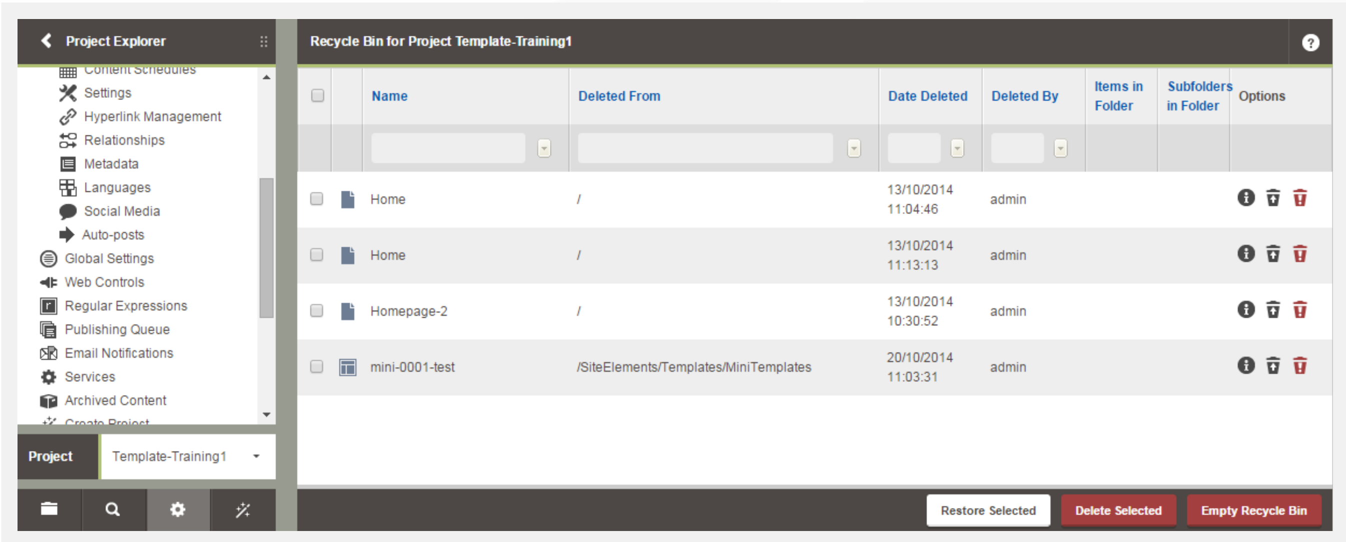
## Recycle Bin

Deleted content will be sent to the Recycle Bin for a period (default is 60 days) before being deleted permanently.

### Accessing the Recycle Bin

You will have access to the Recycle Bin by means of the Management Console. As an editor, you will only see content that you have deleted, not content deleted by other users of Contensis.

Items can be restored from the Recycle Bin to their original folder (or to another folder if it no longer exists) at any time before permanent deletion using the Restore Selected button in the bottom right-hand corner.



# WORKING WITH HYPERLINKS

In Contensis there are a number of ways that linking that can be applied.

Contensis will allow you to link to any content within the current project either by dragging and dropping a page or content item from the project explorer tree, or by using the Insert/Edit Link option.

Links that point to a specific page are not affected in any way if the page is later moved from its original location to a different folder, as the system will update any references automatically.

The same applies if the page is renamed, since the system will automatically make changes as required. If the page is deleted, the CMS will automatically remove any associated hyperlinks from pages, although the actual text that was originally linked must be removed manually.

Visually impaired web users are able to tab from link to link and listen to the link text. For this reason, any hyperlinks in an accessible website must always be descriptive of their purpose. The link text must make sense when taken out of context.

Note that you cannot duplicate the same link text on a page when linking to different locations.

Hyperlinks are managed – and referred to as managed links. If you're entering a URL that already exists, Contensis will match it to an existing approved hyperlink ensuring more consistent use of hyperlinks throughout the website.

Administrators are able to change hyperlink details within the Management Console area, and see usage details for a particular link.

## Linking to a CMS Page or Content Item Using Drag and Drop

Contensis allows links to be easily added using drag and drop functionality, where an item can be dragged directly from the project explorer tree into the placeholder area.

Method 1.

1. Define the link insertion point by highlighting the text in the page which requires the link to be added to it.
2. Drag and drop the page or content item you wish to link to from the project explorer tree onto the selection.
3. Result: The highlighted text becomes linked text and displays the title of the webpage or document it is linked to.

Method 2.

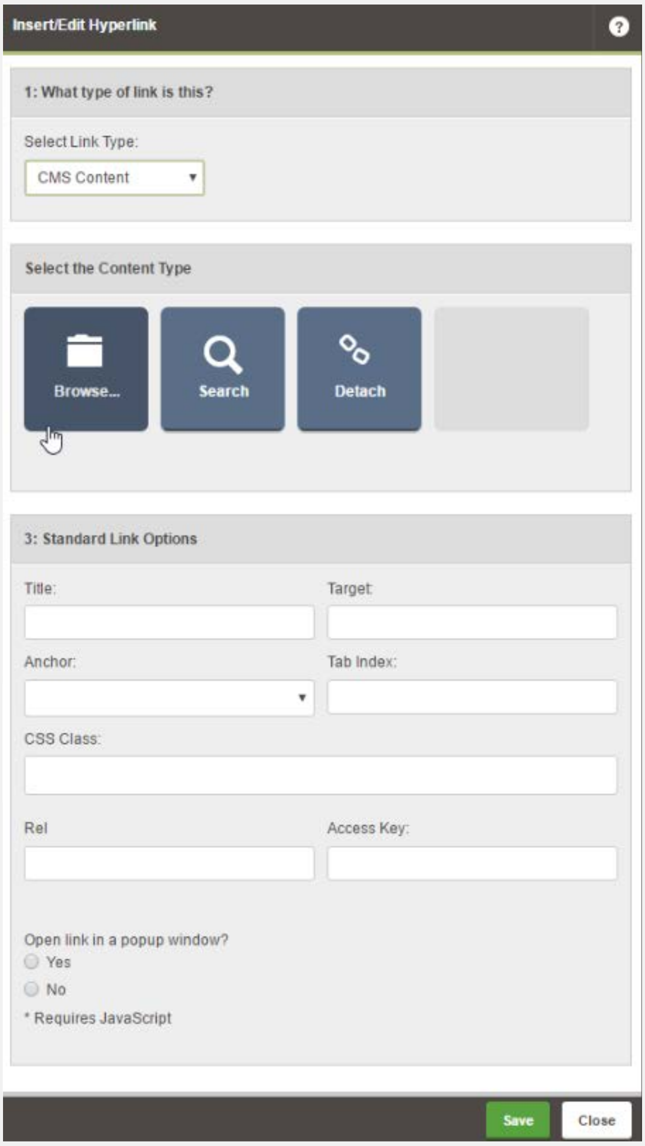
1. Put the cursor in the placeholder at the point where you want the link to appear.
2. Drag and drop the page or content Item you wish to link to from the project explorer tree onto the selection.
3. Result: A link is created at the point where the cursor was positioned, where both the linked text and the title of the link display the same text as the title of the page or content item that it is linked to.

## Linking to a CMS Page or Content Item Using the Hyperlink Tool

The hyperlink button is located in the editor toolbar, which is displayed at the top of the Workspace Area when you are editing a webpage. The screenshot below shows a typical editor toolbar with the hyperlink tool highlighted.

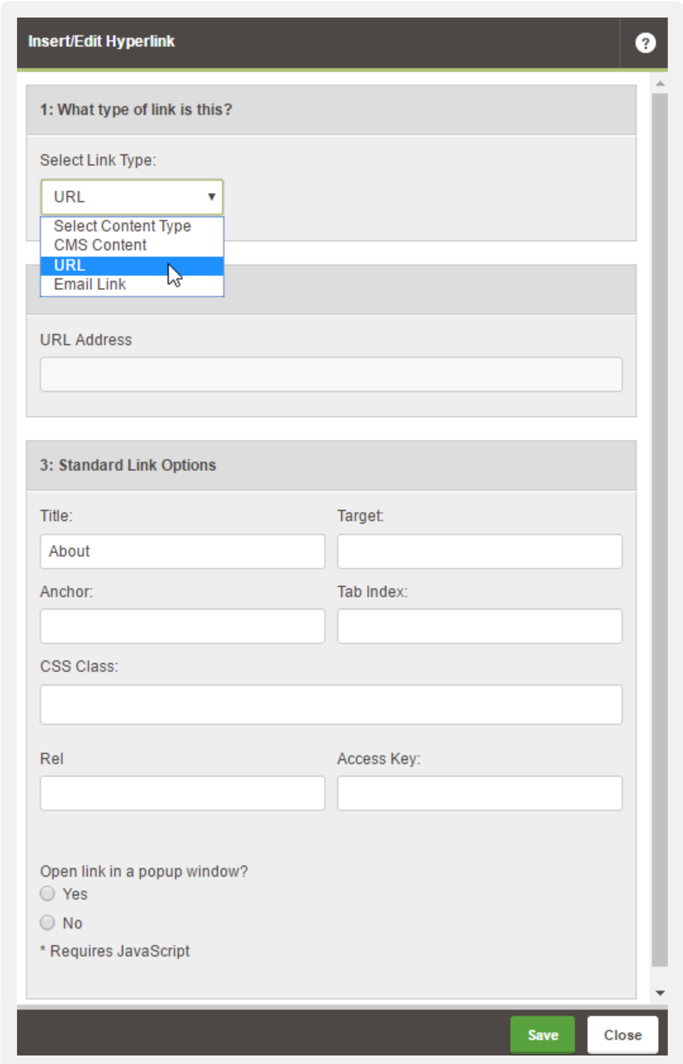

To add the link.

1. Determine where the link is to be added either by selecting text, an image, or by clicking within the editable area.
2. Click on the ‘Insert/Edit Hyperlink’ button or right click at the insertion point and choose ‘Insert Hyperlink’ from the pop-up menu.
3. For ‘what type of link is this?’ Select the ‘CMS Content’ option.
4. Use the blue buttons to browse to the item or search for it if the location is unknown. The link will appear under the buttons. To remove an unwanted link, use ‘Detach’ and then add the new link.
5. Fill in the ‘Standard Link Options’ and click ‘Save’.



## Linking to External Websites

1. Determine where the link is to be added either by selecting text, an image, or by clicking within the editable area.
2. Click on the 'Insert/Edit Hyperlink' button or right click at the insertion point and choose 'Insert Hyperlink' from the pop-up menu.
3. Select the 'URL' option from the dropdown selector.
4. Add the URL address of the web page where prompted.
5. Enter a link title that is helpful and meaningful.
6. Select whether you require the link to open in a new window or not.
7. Click 'Save' to add the link.



# Creating Links in the Project Explorer

Contensis allows you to create and store pre-defined hyperlinks using the ‘Hyperlink’ content type indicated by the icon.

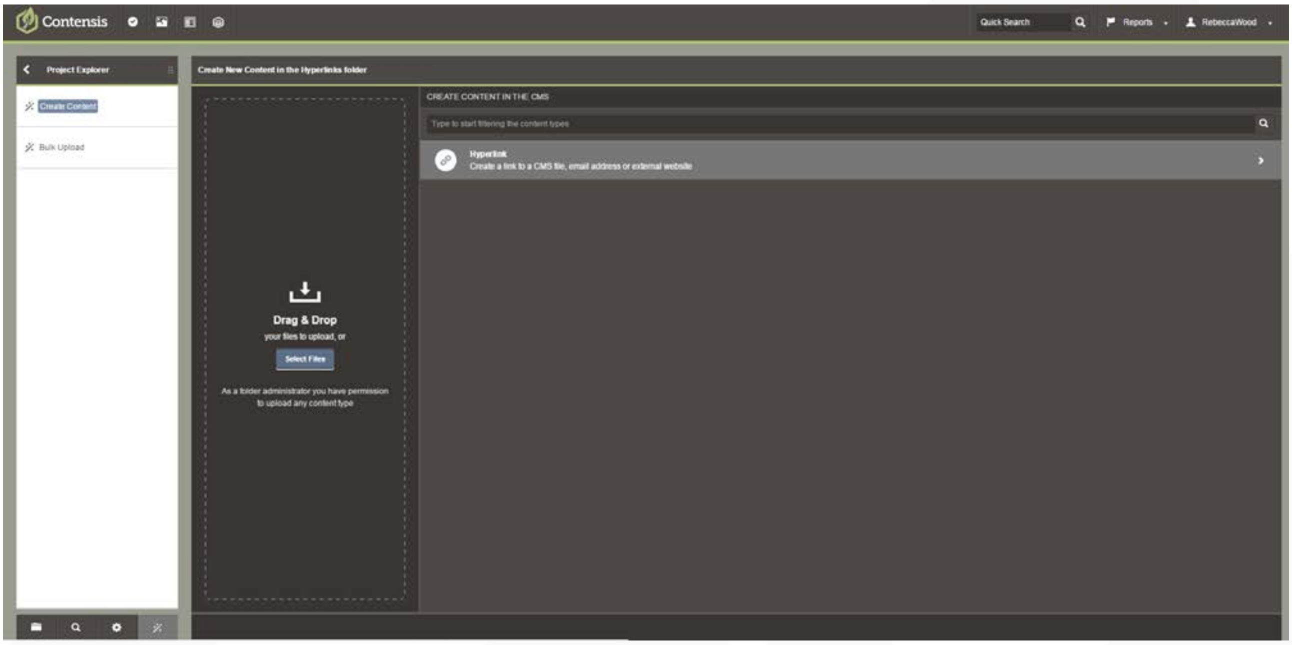
These links can be used in the following manner:

- Can be applied to content using drag and drop.
- Can be listed out to a webpage as a menu if referenced using a listing control that points to a specified folder location.

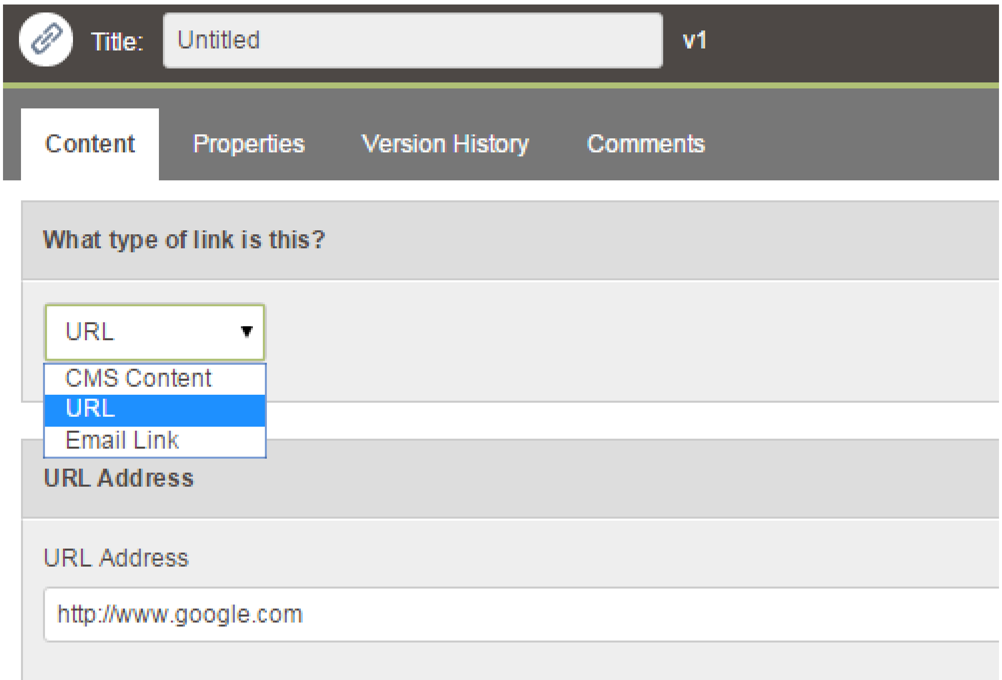
## To create a hyperlink content type

1. Check that the destination folder has hyperlinks added as a permitted content type. (See [Folder Administration Permissions] for more detail on how to add content types to a folder.)
2. Click on the destination folder and choose ‘Create new content’ or click the Wizard at the foot of the Project Explorer (shown below) and choose ‘Create new content’ from the Project Explorer.

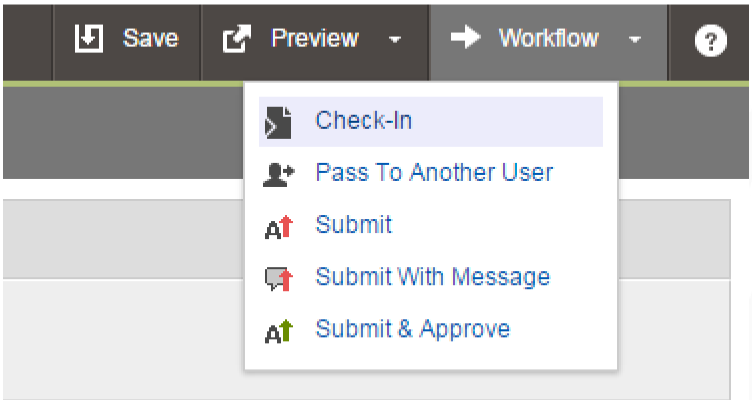
3. Select the Hyperlink type (if you can’t see the hyperlink type listed then permissions have not been created for this content type in the destination folder and you should contact a Systems Administrator).



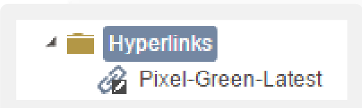
4. Choose the relevant link type from the drop down and fill in the box that appears. For CMS Content you will have the option to browse to the content in the project explorer tree.




5. Click ‘Save’ and follow the next steps in your particular workflow.




6. When created the hyperlink within the folder will display like this:



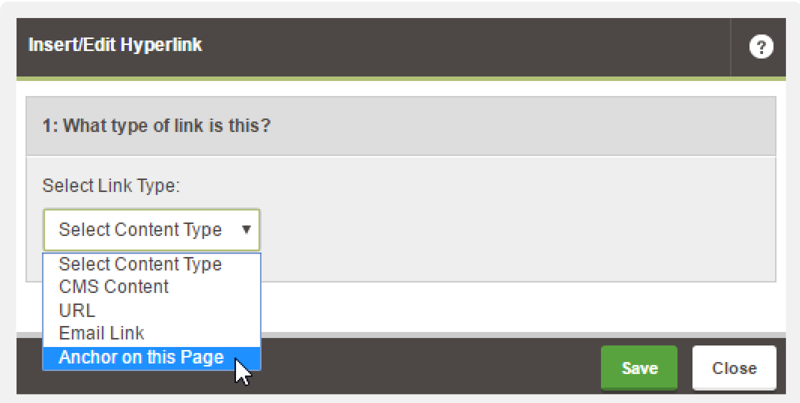

## Page Anchors

Page anchors allow for links to point to specific areas within the current page or an external page.

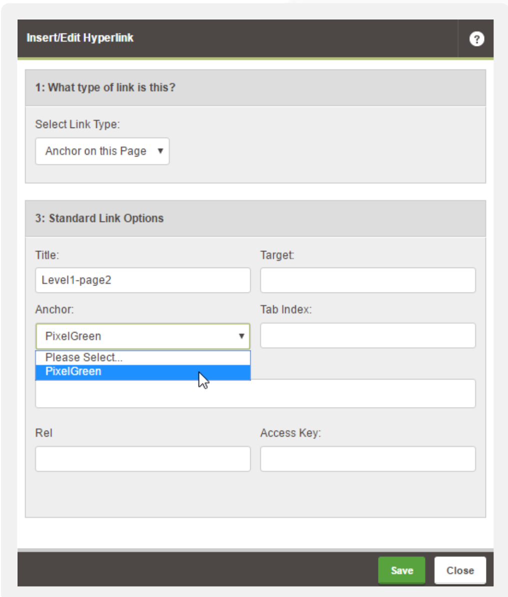
1. First decide where the anchor point is to be added,
2. Then click on the ‘Insert/Edit Anchor’ ⚓ icon.
3. If a selection of text has been made prior to clicking on the icon, then a window will open with the name of the anchor already populated, as shown in the screenshot below. Otherwise, enter a suitable name for the Anchor point (this should be meaningful and related to describing the content at that

point).


4. Select the text on the page that is to link to the anchor point.
5. Click on the ‘Insert/Edit Hyperlink’ icon, and if the anchor is within the current page, click on the ‘Anchor on this Page’ option from the dropdown.



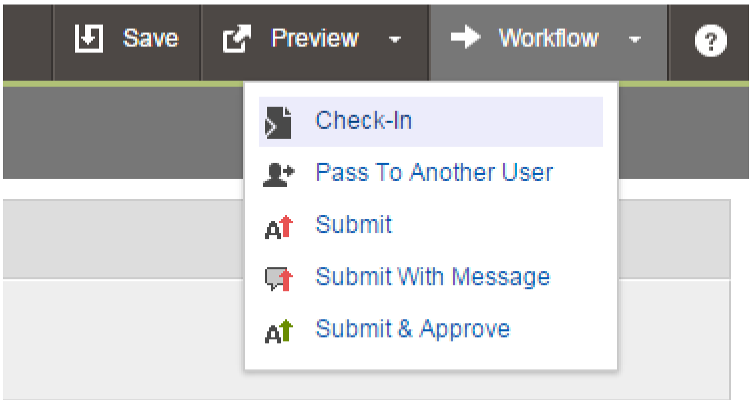

6. This will open another window showing the ‘Edit Hyperlink’ options.
7. Add in the information, as for a normal hyperlink, and then select the anchor from the dropdown as shown above.
8. If linking to another page, first browse to the page and then follow the same procedure again.



# WORKFLOW

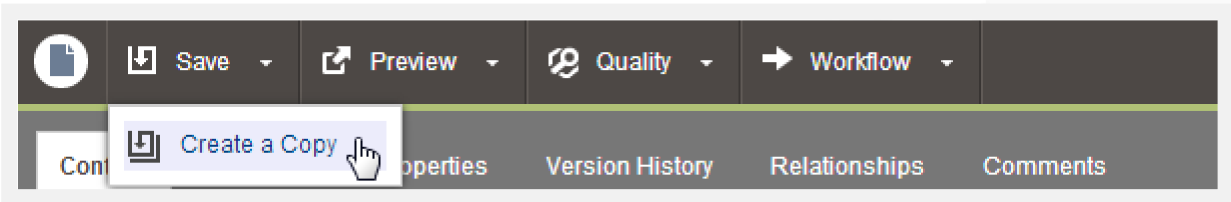
In Contensis, the workflow covers the steps from content creation through to publication. It is permissions based, so the options available to you will differ depending on your permission levels.

The different workflow options are available from the toolbar buttons below. The options appearing in the drop down will differ depending on the current status of the page, and the permissions of the user viewing the page.



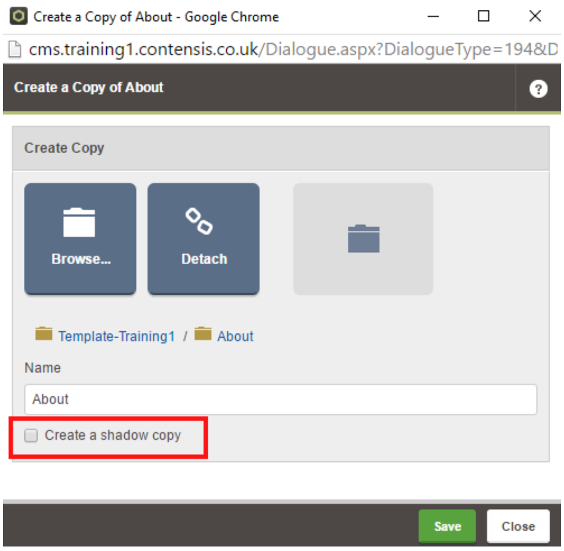

## Saving a Web Page

The 'Save' option allows you to either save or create a copy of the current item. Saving an item will store the saved page information in Contensis, but will not publish a version of the page to the live website. This requires a further action that will be discussed later.




- **To save a web page**
  With the web page open in the Editor, click on the '**Save**' button, or alternatively use the keyboard shortcut keys '**CTRL + S**'. This will save the changes to Contensis, and retain the editing status of the page to allow for continued editing of the content. Multiple edits and saves can be performed before progressing to the next workflow step.

- **To Create a Copy/Shadow copy**
  Click on the 'Save' dropdown arrow and select the 'Create a Copy' option from the list. Contensis will display the following:



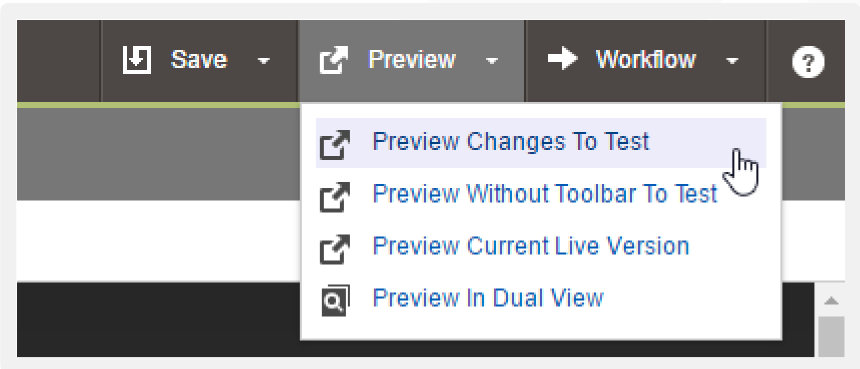

To create a copy, simply click Save. To create a Shadow copy instead, tick the box (shown in red). A Shadow page is a duplicate that CANNOT be edited. Editing the original Master copy will also update all published Shadow copies. If a Master copy is deleted, all dependent shadow pages will be deleted too.

## Previewing a Web Page

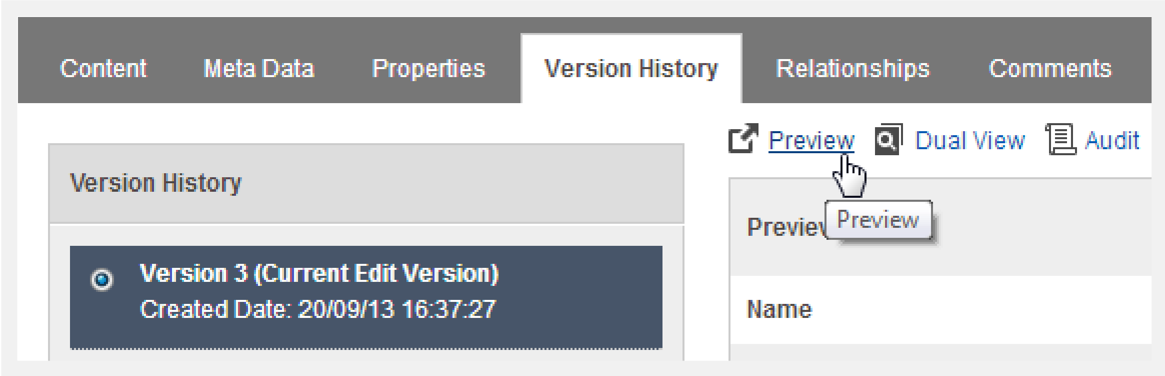
The Preview feature allows you to view pages as they would appear on the published website, and is primarily a means of checking both display and content before the item progresses to the next workflow stage (approval). Previewing is also useful for looking at previous historical versions of an item.

There are a number of ways that a webpage can be previewed (for live or test servers).

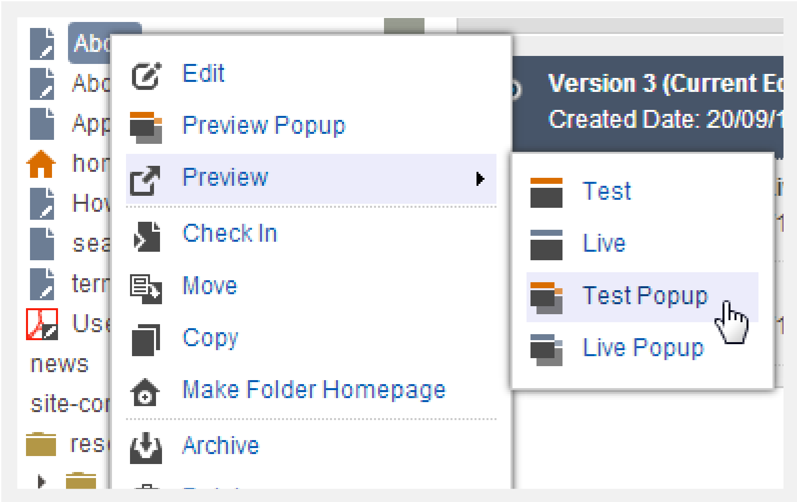
When editing a web page, the page can be previewed to the 'test' server by clicking the Preview button. Alternatively, click on the dropdown arrow to show the additional options for 'Preview current live version', or 'Preview dual view'.




Under the Version History tab, you can preview individual versions of a page by first selecting the version required, and then clicking the Preview button.




You can also click on a webpage in the Project Explorer tree and then select one of the preview options. There are a number of previews available, to display either in the CMS Editor Interface (workspace area), or as a pop-up for both the current live version and the saved edit version via the test preview server.




## Dual View of Web Page

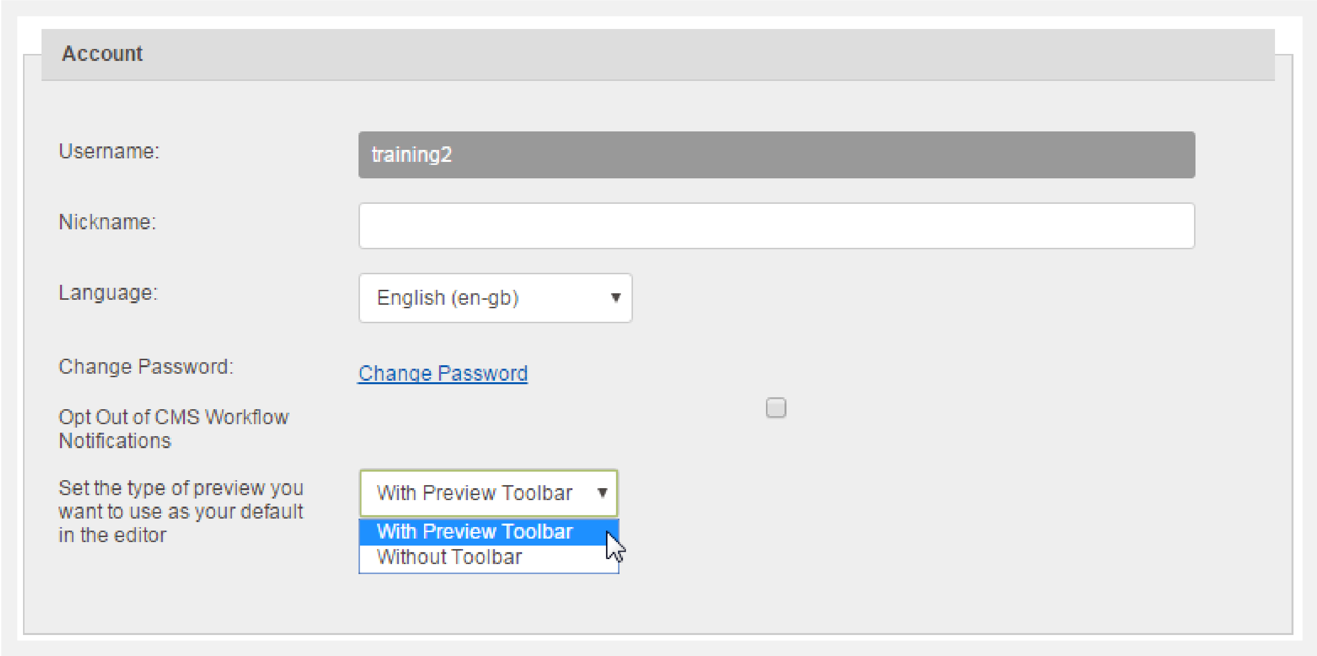
There may be instances when you need to compare different versions of a page.

To do this, click the Preview dropdown arrow, and select 'Dual View'. Once the new window has opened, you can select different versions from each of the dropdown listings for comparison purposes.

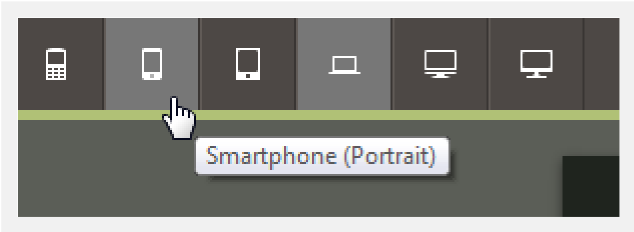
Using the Dual View button at the top of the Version History screen allows you to view different versions alongside one another.

## Responsive Preview

In Contensis 8.3, it is now possible to see a preview of your page in a responsive preview screen. This can be turned on/off in your profile settings, as shown.



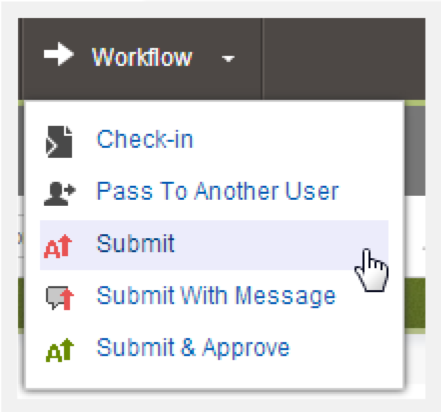

The responsive preview allows you to easily see what your webpage will look like over a range of common device types such as feature phone, mobile phone, tablet, laptop, desktop, and HDTV – in both portrait and landscape modes for each type.




## Submitting a Web Page (for Approval)

Submitting a page sends it to the next step in the workflow where it then becomes read-only and cannot be edited, unless the submission is revoked.

### To submit a web page



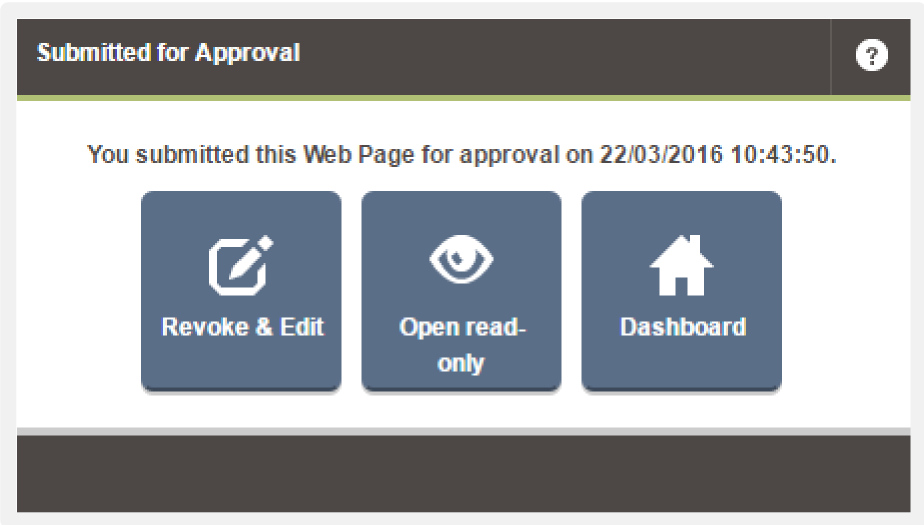

Ensure the Page is open in the Editor, and then click the 'Workflow' dropdown arrow and select 'Submit' from the list.

Note: In this example all options are visible, as would be seen by a user with approval permissions. Your view may be different.

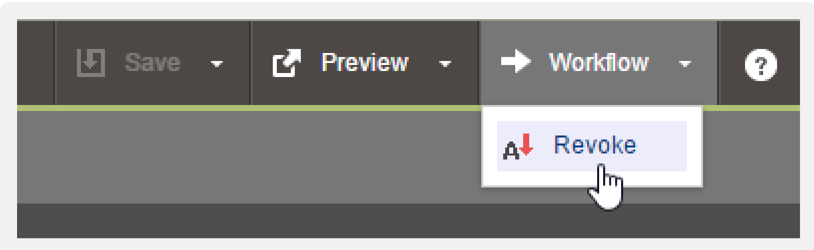
# Revoking a Web Page

When a page is submitted for approval, you will no longer be able to edit it. Further editing can only be carried out by first revoking the submission.

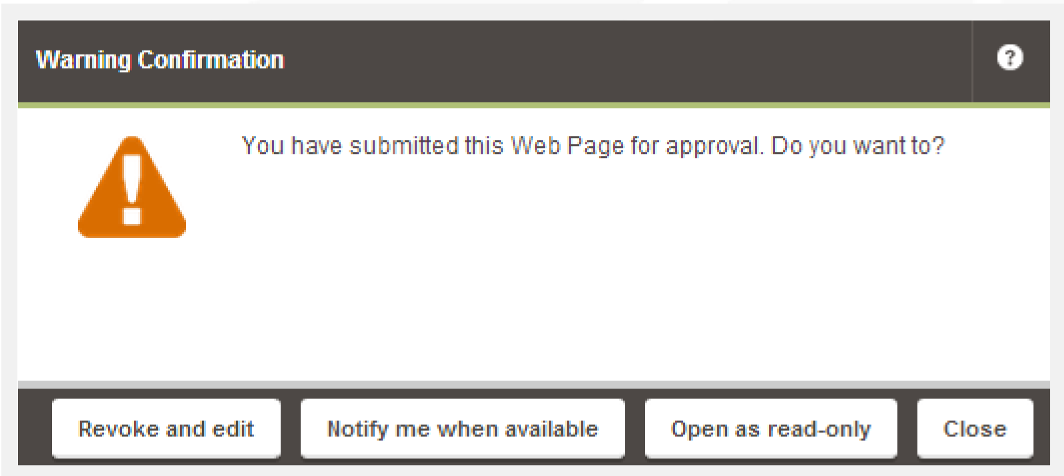
When you submit an item, the following confirmation screen will be displayed. There is an option to revoke the item immediately as shown.




If the screen does not display, click on the 'Workflow' dropdown option and select the 'Revoke' option.

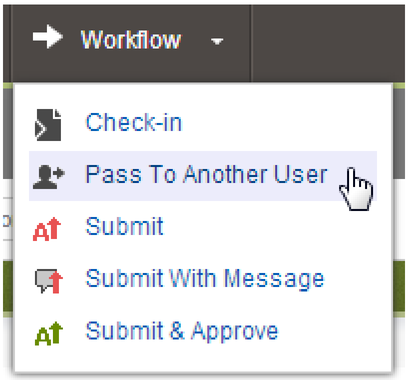



Otherwise, if the file has been closed, click on the file in the Project Explorer and choose Edit, and the following screen will display. Choose 'Revoke and edit'.

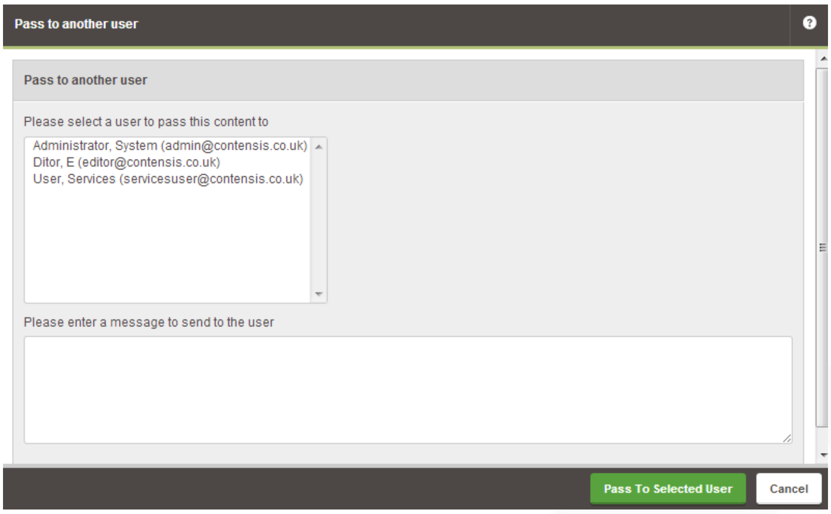


# Passing the Web Page to Another User

When working on a page within a managed workflow environment, at times, you may wish to pass the page on to another user, maybe in cases where the other user may have specific knowledge or skills needed to complete the editing of the page.




You can easily Pass to another user by clicking the 'Workflow' drop down arrow, and selecting the '**Pass To Another User**' option.




Select the Name of the person to pass the page to, add a helpful message, and then click the '**Pass To Selected User**' button.

Note: the 'checked out' status of the page will transfer from the originator to the recipient user.

# Checking in Work

At some point more than one user will want to edit the same page, at the same time. To avoid potential confusion, Contensis automatically checks out a page to you as a user when you open a page to edit.

The page will then remain checked out to you until you:

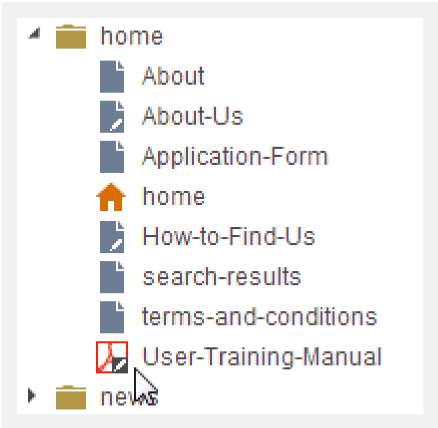
- either submit it for approval, or
- you choose to check the work back in using the 'Check-in' option, or
- you opt to log out of Contensis and are presented this option.

Checking out a page prevents any other user from editing it whilst it is in a checked out state. It normally indicates to other users that the page is being edited by another user of the system. Before they can edit it, you must check it back into the system. System Administrators are able to check in work for you if the user is not available, for example they may be off ill.

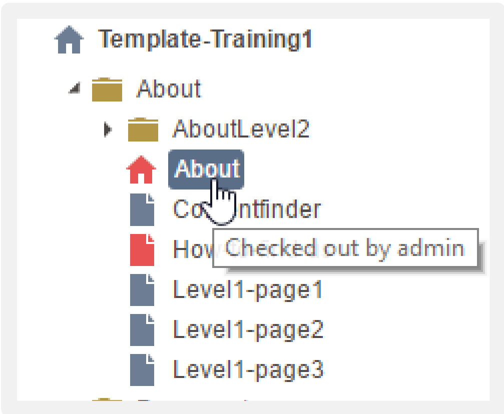
Checking in a page makes the file freely available for other Contensis users to work with.

### Checking in web pages

1. From the Contensis Project Explorer Tree click on the webpage that is checked out, and click on the ‘Check-in’ option in the context menu.
2. If you already have the page open in edit mode, you can choose the Workflow button above the tabs, and then select ‘Check-in’.

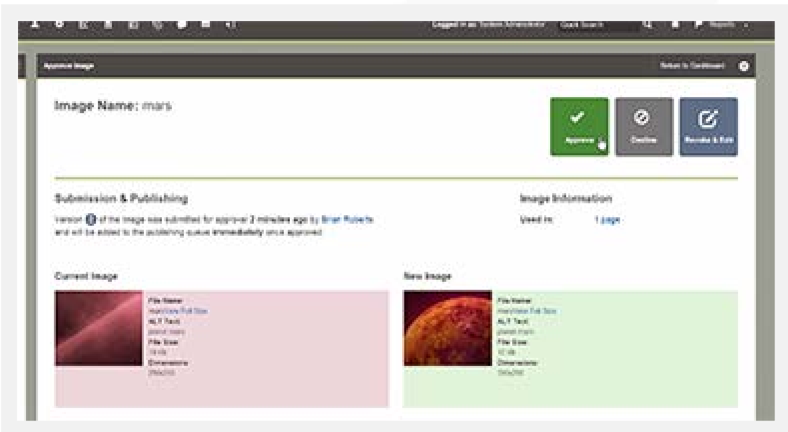



Note: Items that are currently checked out are indicated by a small pencil icon in the bottom right of the Content Type icon.




If a webpage or content item is checked out by another user then the icon will appear red. When hovering over this, you will see the name of the user that it is checked out to.

## Approving Pages



The CMS is asking you to make a decision; should I permit this content to go live? To help you make this decision there’s a simple summary detailing when it was submitted, who submitted it and what will happen if the page is approved.

When you are approving a page you might also be approving an image or new hyperlink that was added in a recent edit. You get an overview of the images and hyperlinks you're approving. If an image has been altered, you'll see a "before-and-after" comparison right in the approve/decline screen.

Often multiple people contribute to a page, so a succinct list of who was involved in an edit is also made available.

You can also find out about content schedules that apply to the page; you can understand when that item will expire or come up for a review.

There are quick links to dual view (compare old and new versions of a page), track changes (highlight individual edits) and preview.

## Approving a Single Page

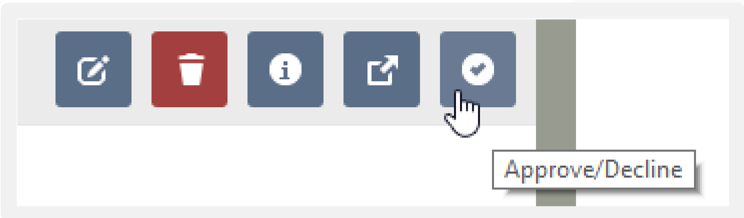
Approving pages publishes them to the live website.

A user can only approve a page after it has been submitted for approval, and it is only possible to approve pages if you have been given approval permissions.

There are a number of ways that you can authorise pages:

- **Approve or Decline Content from your Inbox**
  Contensis email notifications now include a link that allows you to access the system to Approve or Decline the content directly from your email. If already logged in to Contensis, the link will take you to the Approval screen.

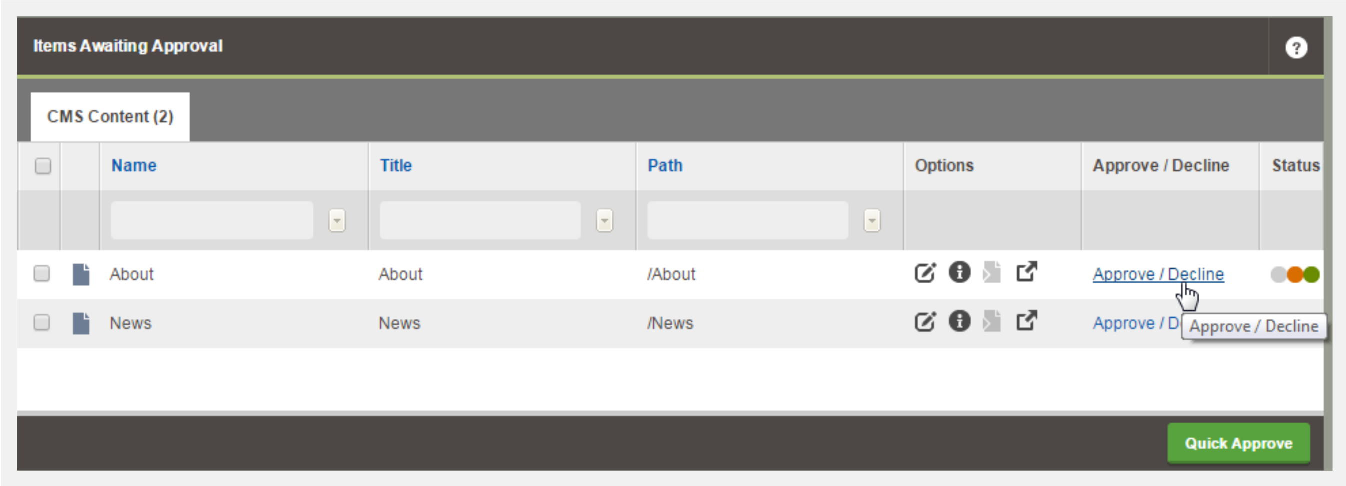
- **From the Dashboard View**
  Under the 'My To-Dos' content to approve option, cursor over a Page or Content Type. You will then see five buttons, the last one being the Approve/Decline button. Click this button to then view details.



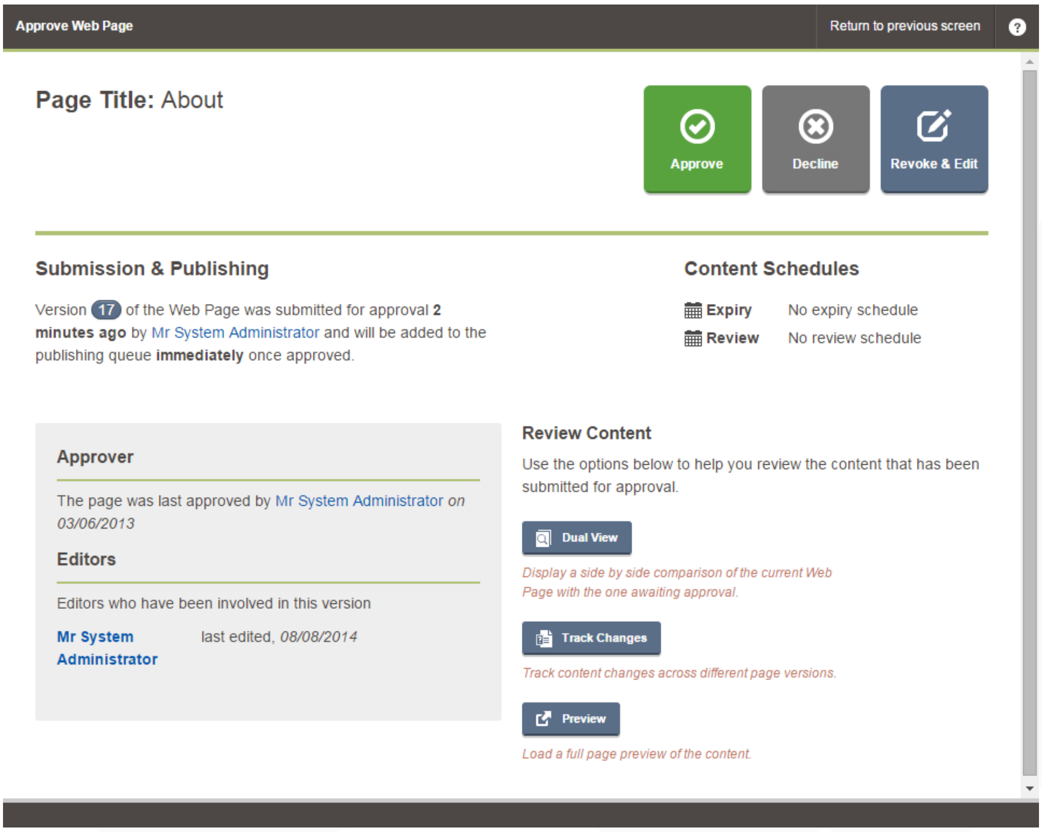

From this area, there are options to Preview or Revoke and Edit the content too.

- **Approving a single Page from the Project Explorer**
  Locate and open the required page from the Project Explorer tree.
  Approve the selected page by clicking the 'Workflow' dropdown arrow, and then clicking the 'Submit and Approve' button.

- **Multi-Authorise**
  Use either the '**See content awaiting your approval**' (button on the top toolbar) or '**Reports**' button dropdown (button on the right of the top toolbar) and select '**Content Awaiting Approval**'. This will open a view of pages awaiting your approval.




## The approval screen



# PAGE MANAGEMENT

This section will look at ways of managing your web pages in Contensis.

## Adding Metadata for a Web Page

Metadata is a very important part of creating web pages.

Metadata is information which identifies the content of a web page. Commonly used metadata items are:

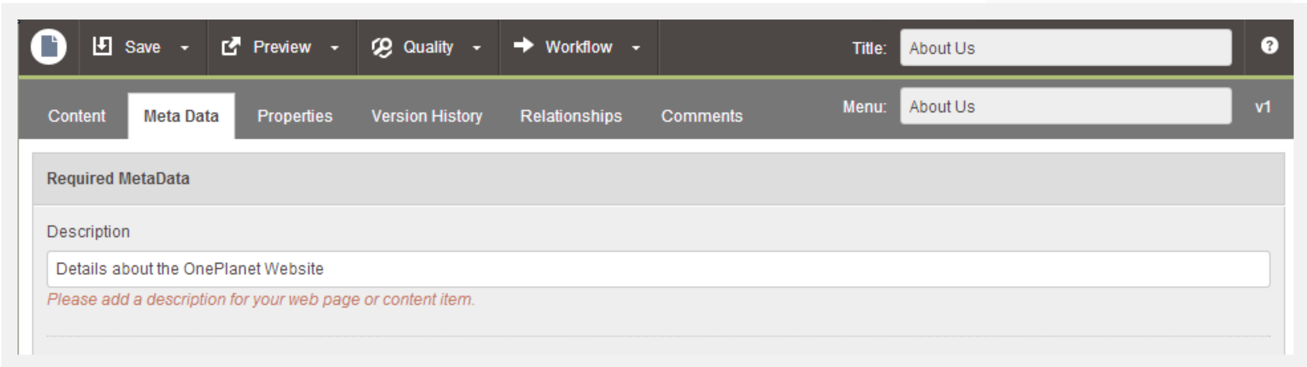
- Title
- Description
- Keywords
- Author
- Rights
- Date
- Language
- Category

Metadata can also be used for other purposes too. In Contensis there are two types of metadata:

- System
- User

As an Editor you will only need to be aware of user metadata, e.g. Description or Keywords. In practice, there may be other options available for you to complete too depending on the requirements of the site.

To add metadata, click on the '**Metadata**' tab within the page editor as shown below.




This will display an area showing the Metadata that is assigned for the page template.

### Types of Metadata

There are three types available.

- **Required Metadata**
  This must be completed before the page can be saved
- **Optional Metadata**
  Completion is at the discretion of the content editor
- **Read Only**
  These are un-editable Metadata items that are assigned to the web page. The Read Only Metadata

can be viewed by ticking the ‘Show Readonly’ checkbox which then displays the information in the panel.

### Types of Metadata input

There are different methods of adding Metadata, some fields may be text fields that can be freely edited by content editors. Others types include selecting from the following:

- populated drop down boxes
- categories displayed from taxonomy trees
- check boxes or radio button items

To enter multiple values for a single metadata entry, e.g. keywords, separate the values by commas, e.g. Content Management, CMS, Enterprise Content Management, Web Content Management.

## Page or Content Status

The status of web pages can be viewed at-a-glance using the ‘Information’ screen. There are a number of indicators in the form of Traffic Lights.  Each traffic light corresponds to a different status of the web page and will give you a quick overall understanding of your page’s current status. Is it live? Is it being edited? Is there more than one version available or has it been submitted?

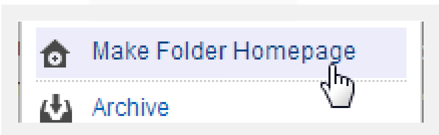
| | |
|---|---|
| **Red** | The page is in the editing process and has no approved (published) version. |
| **Amber** | The page is awaiting approval (publishing). |
| **Green** | The page is currently live. |
| **Red & Green** | There is a live (approved) version of the page and also a version currently in the editing process. |
| **Amber & Green** | There is a live (published) version and also a version that is awaiting approval (publishing). |

Hovering over any of the items will display title text to assist you.

## Setting a Folder Homepage

When a new section is created, you can assign a folder home page. This will be the page which is displayed when a visitor first arrives in that section.

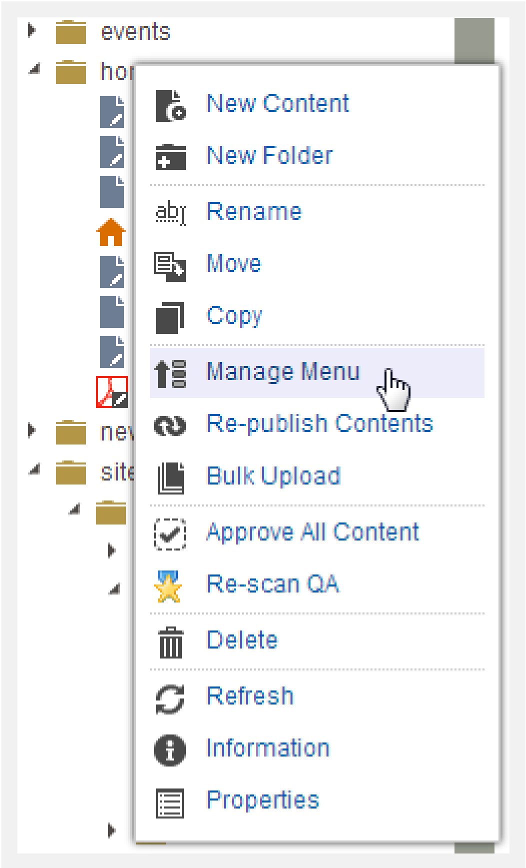
Creating a folder home page can be done by selecting "Make Folder Home Page" from the context menu.




This would normally only be an option available for ‘Folder Administrators’ to action, and so is shown for illustrative purposes here. Having selected the option from the menu, the Project Explorer tree will refresh to display the homepage with the icon visible.

## Controlling Menu Order

For the website to function correctly, and in accordance with the design, items must appear in the correct order in any generated menus.



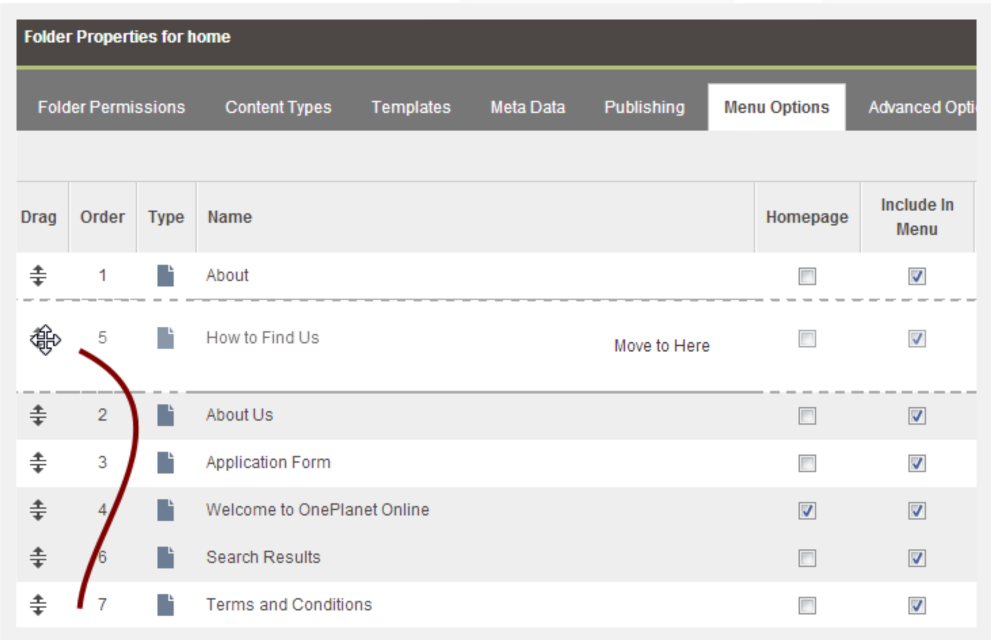

The menu order screen can be accessed at any folder level in the following two ways:

1. By right clicking on a folder and then selecting the '**Manage Menu**' option from the context menu.

   or

2. By right clicking on a folder and then selecting the '**Properties**' option in the context menu. Then select the '**Menu Options**' tab in the main workspace area to access the screen.

The screen shown below will then display. You can left click on the icon on the left of a menu item and then drag that item to the required position to determine the menu order. A typical reordering is indicated in red.



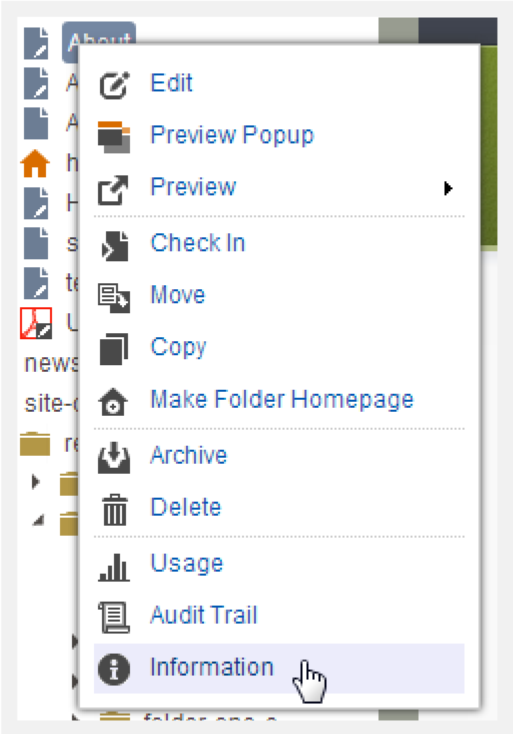
Also, instead of dragging and dropping to move menu items, the values in the '**Order**' column can be overtyped and the system will then automatically re-order the display when clicking away.

Clicking on the '**Save Changes**' button located to the bottom right of the screen will then update the site with the changes.

**Note:** There are also the options to set to alphabetical order and also to revert the changes, should that be necessary.

## Page Information

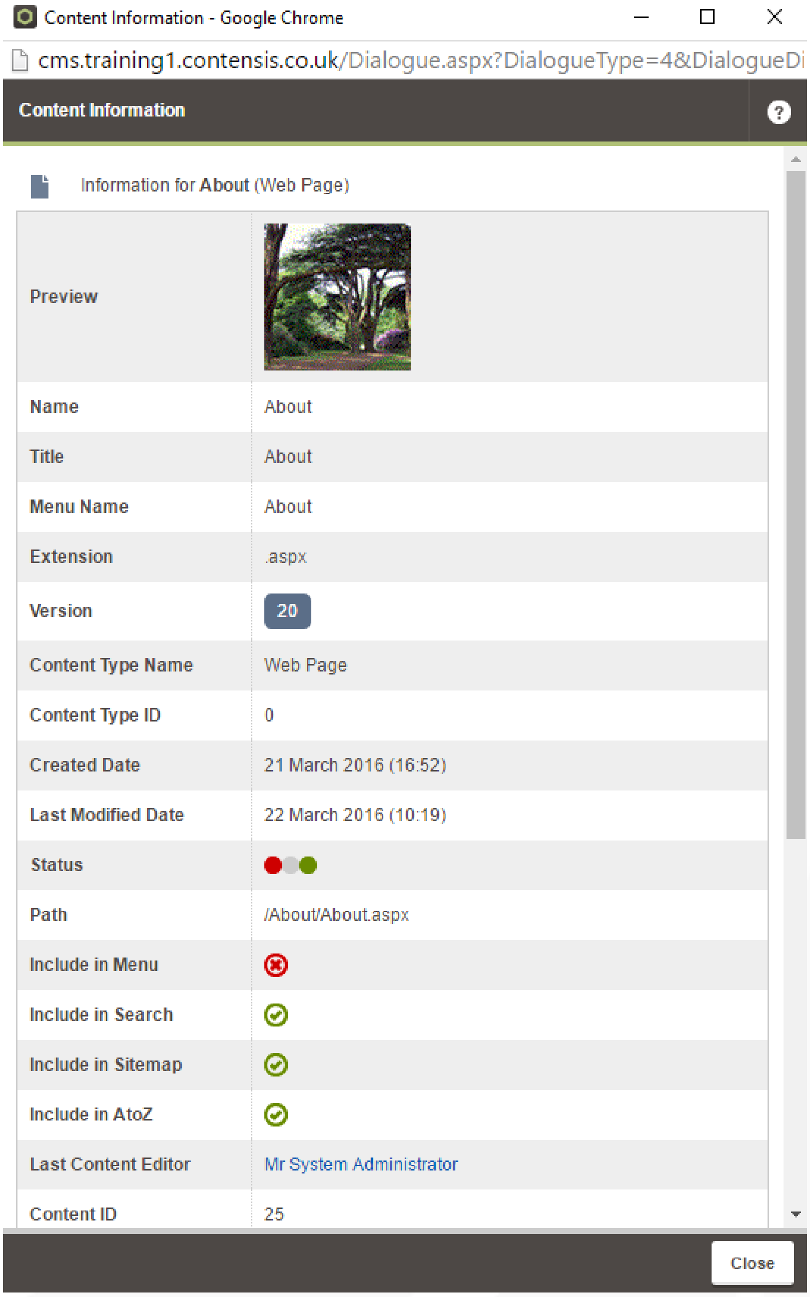
Information is stored and made available for every page in the system. This also applies to all Content Types (Images, Word docs, PDFs etc.).



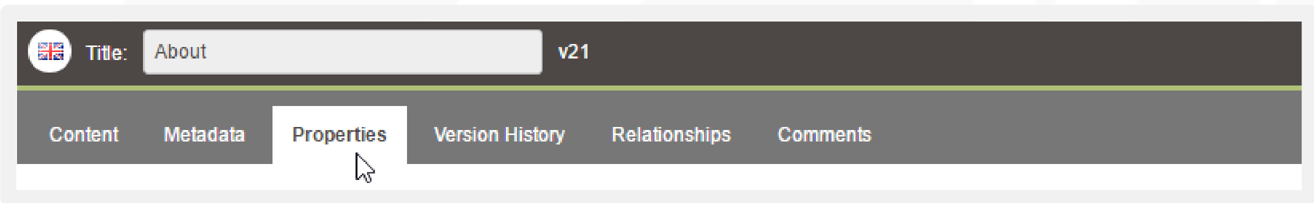

This display contains useful information including details of the last content editor, the page status (edit/submitted/live), created and modified dates, together with version number, location and much more.

Accessing the information display is achieved by clicking on the item in the Project Explorer Tree and selecting the '**Information**' option from the context menu.

This is what the information page looks like:




## Page Properties




Clicking on the '**Properties**' tab will display information relating to the page currently being edited.

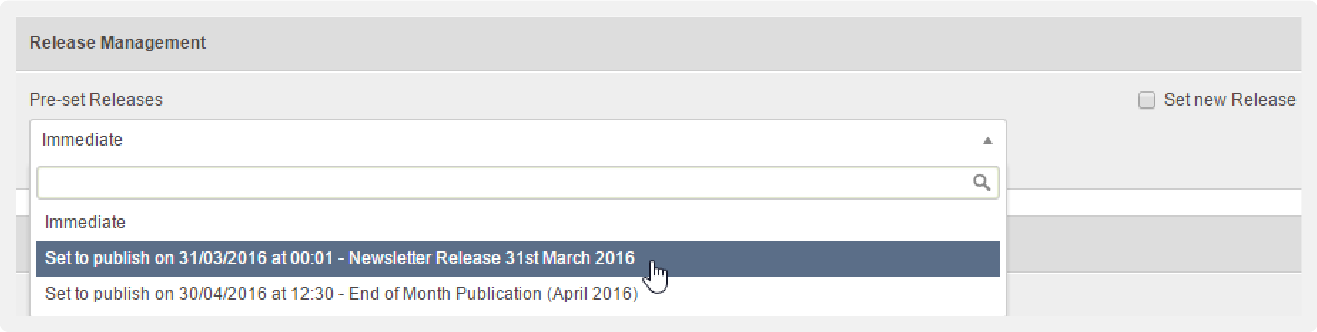
The properties area is categorised into several collapsible/expandable areas, some of which will allow you to apply settings, whilst others are for information only.

From here, content can be released (published), using the '**Release Management**' pre-set release schedules dropdown, or you can create a unique release for the item by ticking the '**Set New Release**' box. In addition, there are also options for you to determine if a webpage displays in:

- System generated menu(s)
- Site Map
- A to Z
- Search results listings.

## Release Schedule

Release Management determines when the approved page goes live. The default publish setting is set to 'Immediate', so that as soon as the item is approved, the item will publish to the live website.

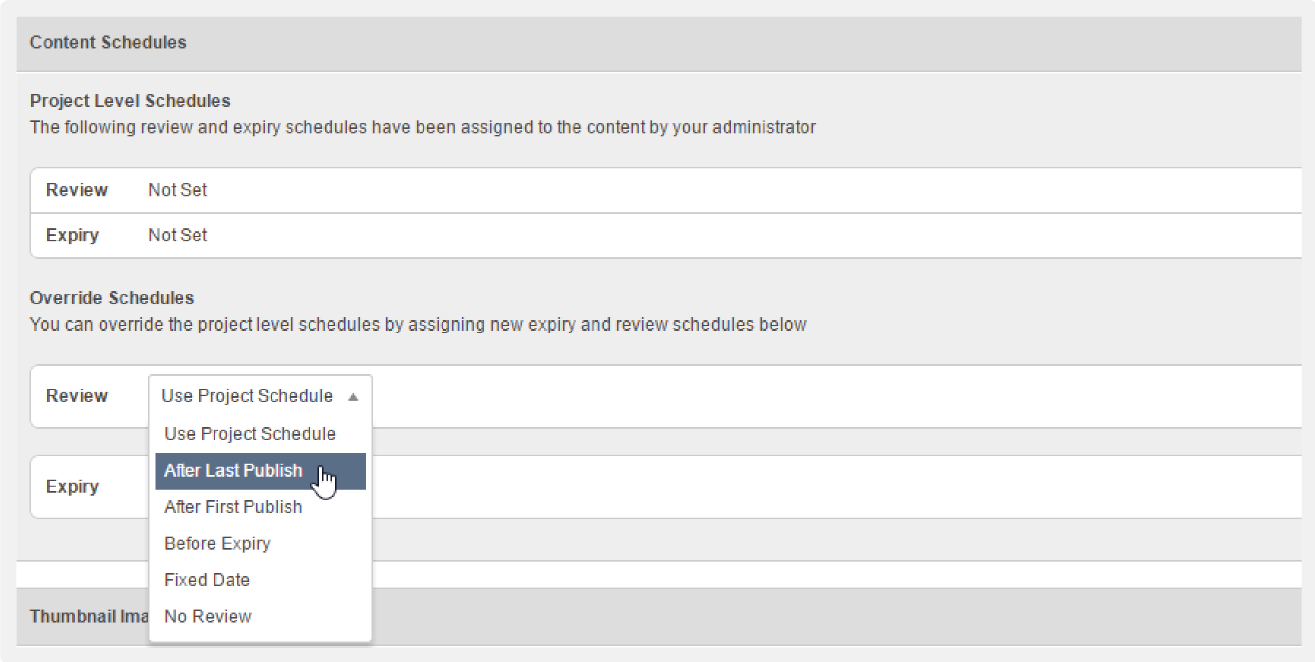



As an editor, if releases have been set up for you, then you will have the option to select a pre-set release date from the dropdown, or alternatively, you can set your own release schedule using the '**Set New Release**' check box option. Having set it for this item, it will not remain as an option for you or others to use for future editing.

Pre-set Releases require setting up by Administrators. If you would like to set them up contact your System Administrator.

## Content Schedules

Here you can define a schedule detailing when content should be reviewed (or expire) and assign it to content of your choice. You can set a schedule against a project, a folder or against individual content items.




An example might be to set a review schedule against all PDF documents in your project. You can then create exceptions to the rule, as you might need to review documents in one area more frequently than in others.

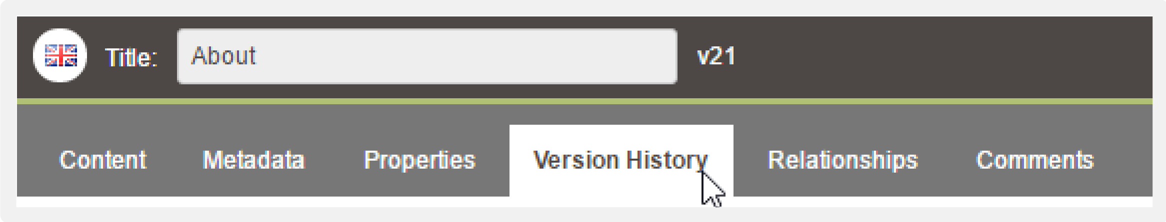
You can view all content associated with a schedule in a single location.

## Other property areas

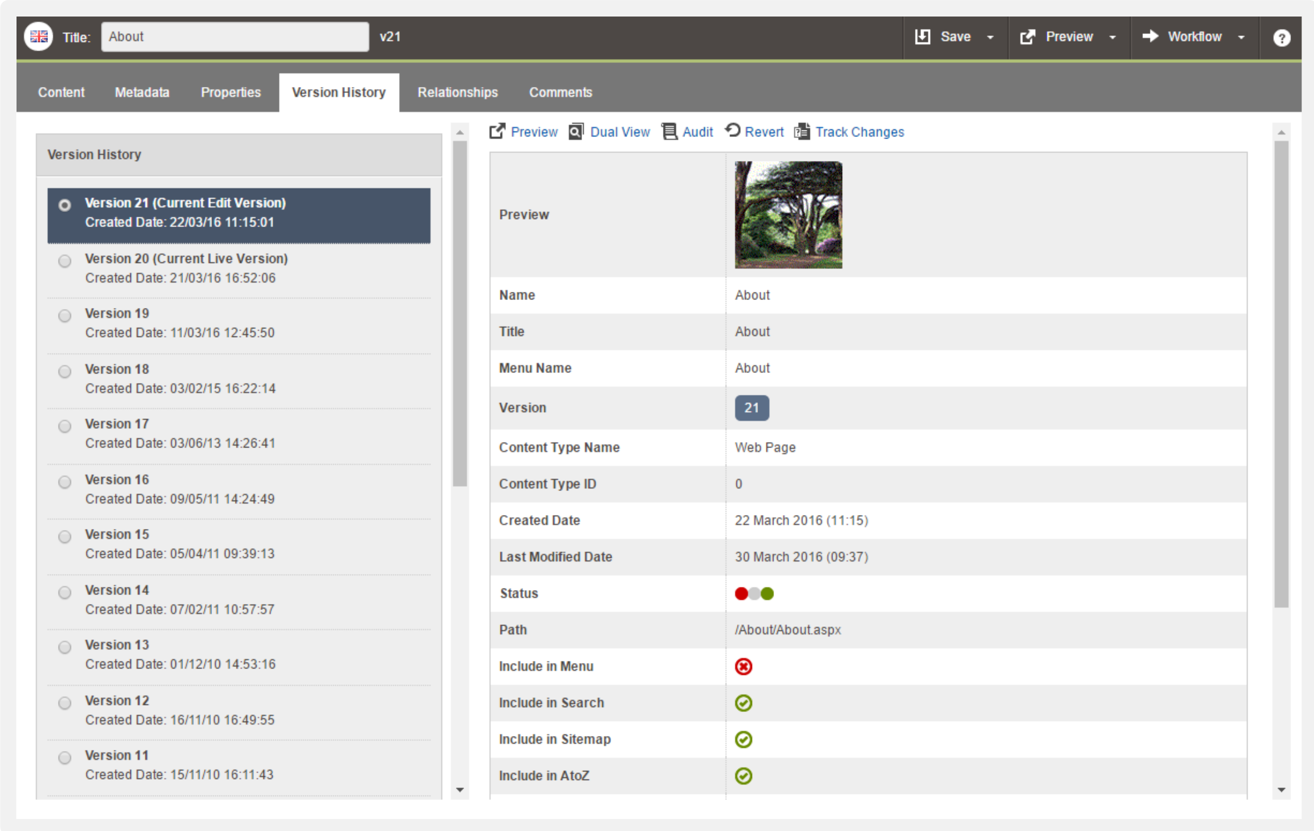
- **Thumbnail Image**
  Assign a thumbnail image for a page - this will be displayed in listings e.g. search results.
- **Aliases**
  Set one or more aliases for the webpage.
- **General Information**
  See information relating to a page.
- **Content Information**
  View a word count for each editable placeholder area and also a total for a webpage.
- **Stylesheet Inclusions**
  See assigned stylesheets for a webpage (these appear linked for administrators).
- **Template Inclusions**
  Shows a list of templates used for building the webpage (these appear linked for administrators).

# Version History

Previewing Pages/Content options




Selecting the '**Version History**' tab will display historical information for a webpage.




The left column shows the version number and date created for each version of the page, with the most recent at the top of the list. You can see that this is the version number showing when the page is open in edit mode i.e. v21 to the top right of the screenshot.

Click on the required version number to display the information relating to that version in the right column area.

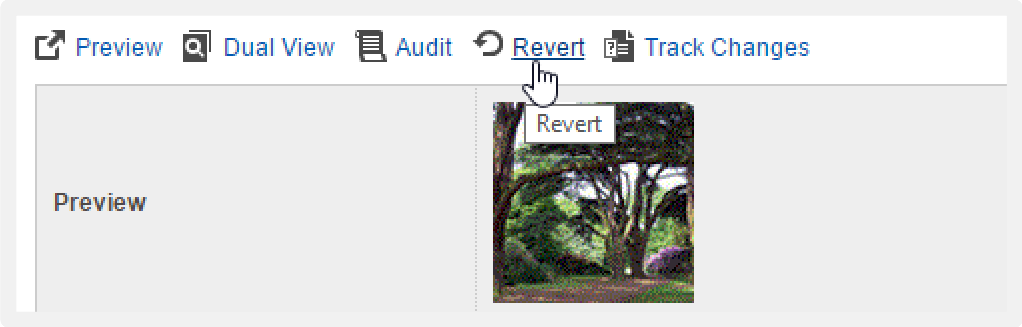
## Reverting to a Previous Version

Contensis supports multiple version control, meaning you are able to view or step back to a historical version of a web page. Every time a page is approved (published) it becomes a version.

## To Revert to a Previous Version

1. Open the document for editing.

2. Select the '**Version History**' tab and then select the version of the page you wish to revert to by clicking the radio button (see Version History above). Click on the '**Revert**' link.

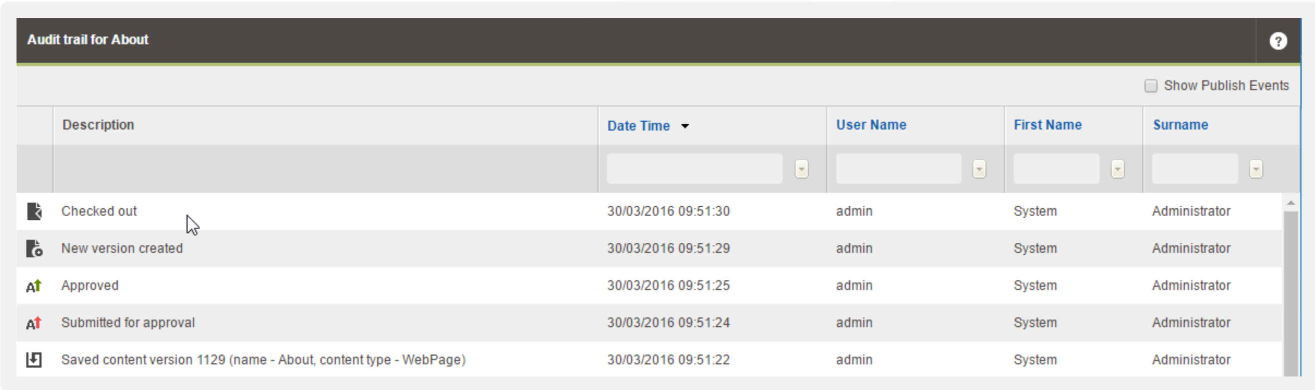



3. The version you have selected will now open in the editor as the next incremental version number.

You can never edit a previous version directly, as the historical state is always preserved. However, reverting to a previous version takes a copy of the version you have selected, and then creates it as a new editable version. This 'copy' can then be edited and any changes saved and approved in the normal way. The copy will become the newest version of the file.

## Audit Trail

The audit trail function documents all major actions that have taken place for a web page or content type and records times and user details for each action.



Audit trail for About

Show Publish Events

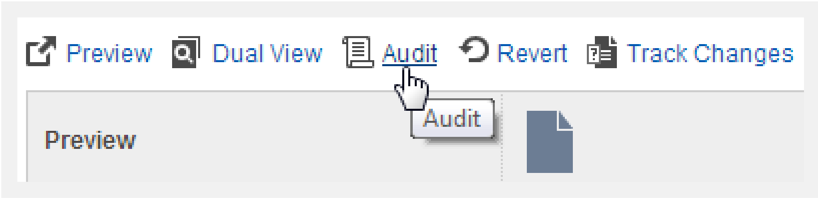
| Description | Date Time | User Name | First Name | Surname |
|---|---|---|---|---|
| Checked out | 30/03/2016 09:51:30 | admin | System | Administrator |
| New version created | 30/03/2016 09:51:29 | admin | System | Administrator |
| Approved | 30/03/2016 09:51:25 | admin | System | Administrator |
| Submitted for approval | 30/03/2016 09:51:24 | admin | System | Administrator |
| Saved content version 1129 (name - About, content type - WebPage) | 30/03/2016 09:51:22 | admin | System | Administrator |

The actions recorded relate to the status of the page and include:

- Page created
- Workflow check out
- Check in
- Submitted
- Revoked

- Approved

Users can view this either directly from the Project Explorer tree, by clicking on a page, or content type, and selecting '**Audit Trail**' from the available list.  Or alternatively, the option is visible when viewing the 'Version History' tab screen whilst in edit mode, and then clicking on the 'Audit' button.




# SITE MANAGEMENT

## Moving Content from Folder to Folder

If you have the required permissions, you will be able to move content from one folder location to another within the same Project.

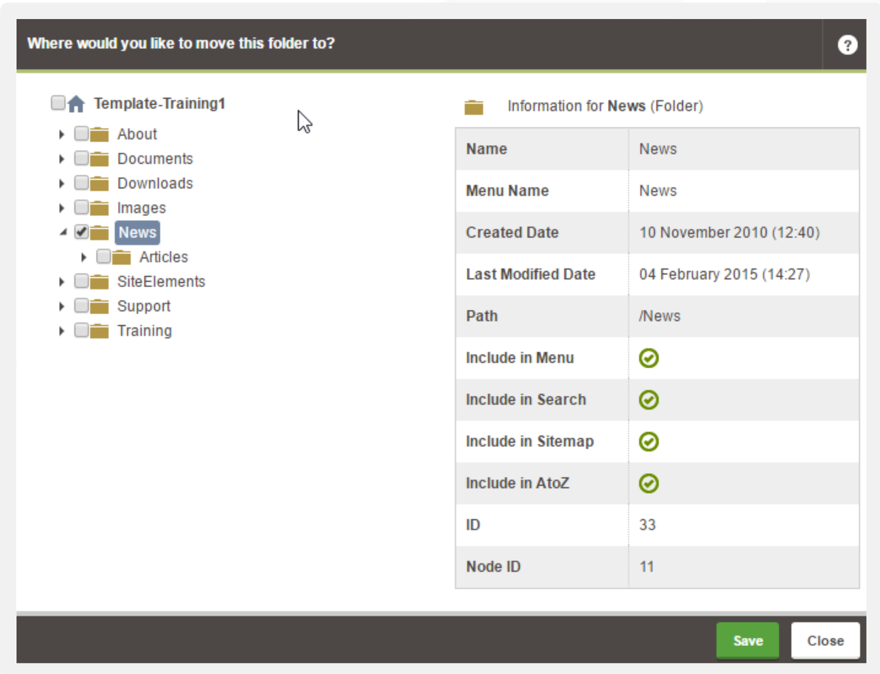
You will not be able to move content to a location where you do not currently have '**Create**' Permissions for that content type at the destination folder level.

When an item is moved, any links previously created will be updated automatically to point to the new location of the relocated web page or content.

### Moving Content in the Project Explorer Tree

1. Locate the page/content type or folder in the Project Explorer tree menu area.

2. Click on the item and select the '**Move**' option from the context menu display which will then open a new window similar to that shown below.

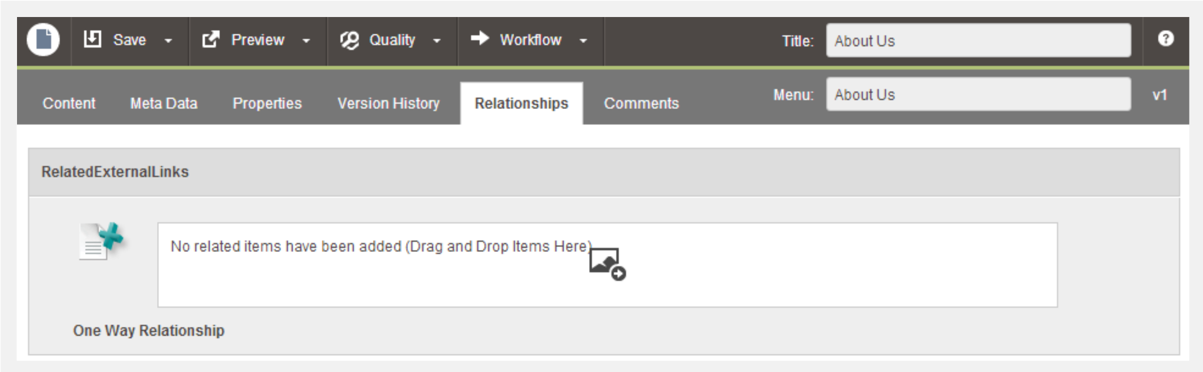


3. Browse to the new location for this content and then click on the '**Save**' button to move the item.

## Related Items (Relationships)

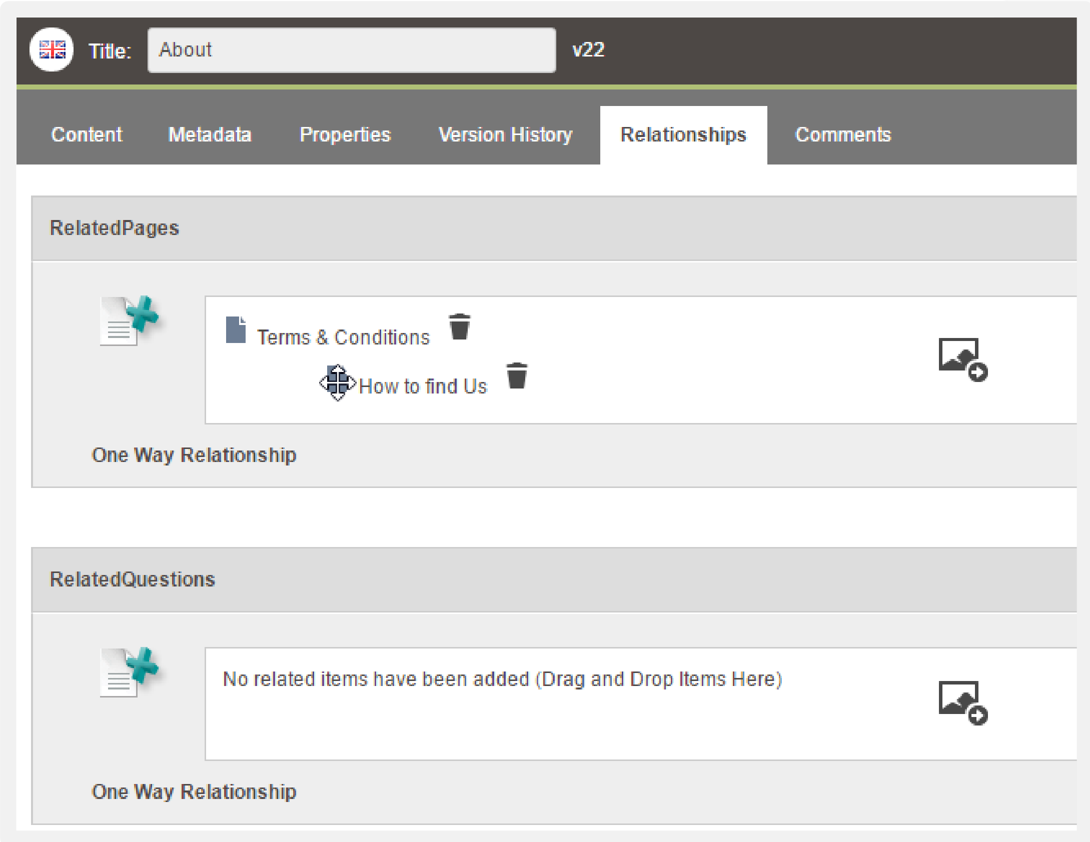
To add a Related Item to your page:

1. Firstly, open your web page to edit, and then click on the '**Relationships**' tab.

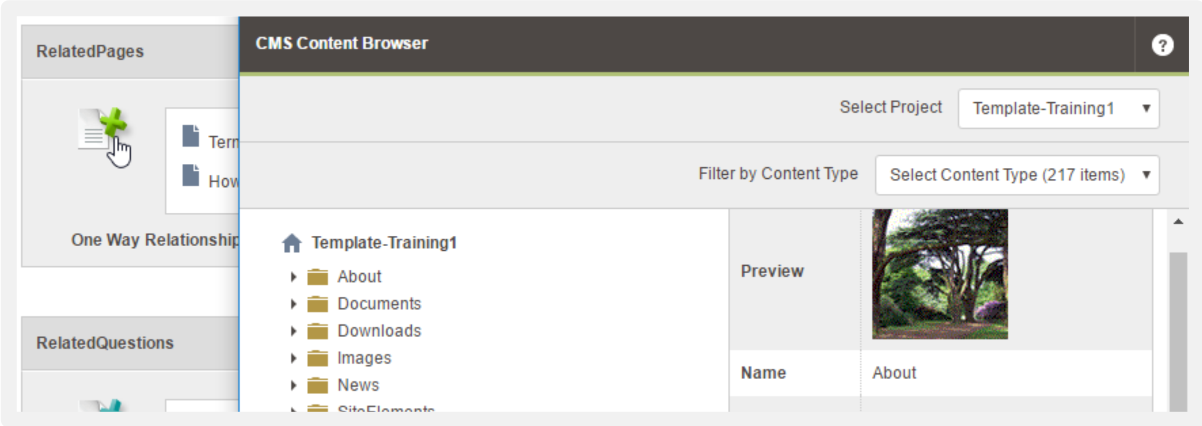



2. Select an item from the '**Project Explorer**' tree and drag and this into the drop zone. Items will then be visible in the area and will appear on the published page listed in the order that they appear here.

3. To re-order your items, place the cursor over an item which will then change to a cross, and whilst holding the left mouse button down, drag the item to the required position.




Note: there are additional '**Relationship**' types that are available, and also an alternative method to add related items.




# FORMS

Form posts have a unique reference number. When speaking with someone who has submitted a form post, simply request the reference number and using the live search in Contensis you can navigate straight to their form post. You can also search by other information in the submission, like a name or email address.

The advanced search gives you the power to filter by read or unread form submissions, date range, keywords and unique reference number.

The email notifications sent out by Contensis contain any attachments that were submitted with the form post. You can read these attachments without the need to be logged in to Contensis. There's also a print button that lets you print off individual form posts, and it is also possible to record someone's details against a form response. This last feature can be turned on/off for individual forms as you require.

## Creating & Adding Forms to a Web Page

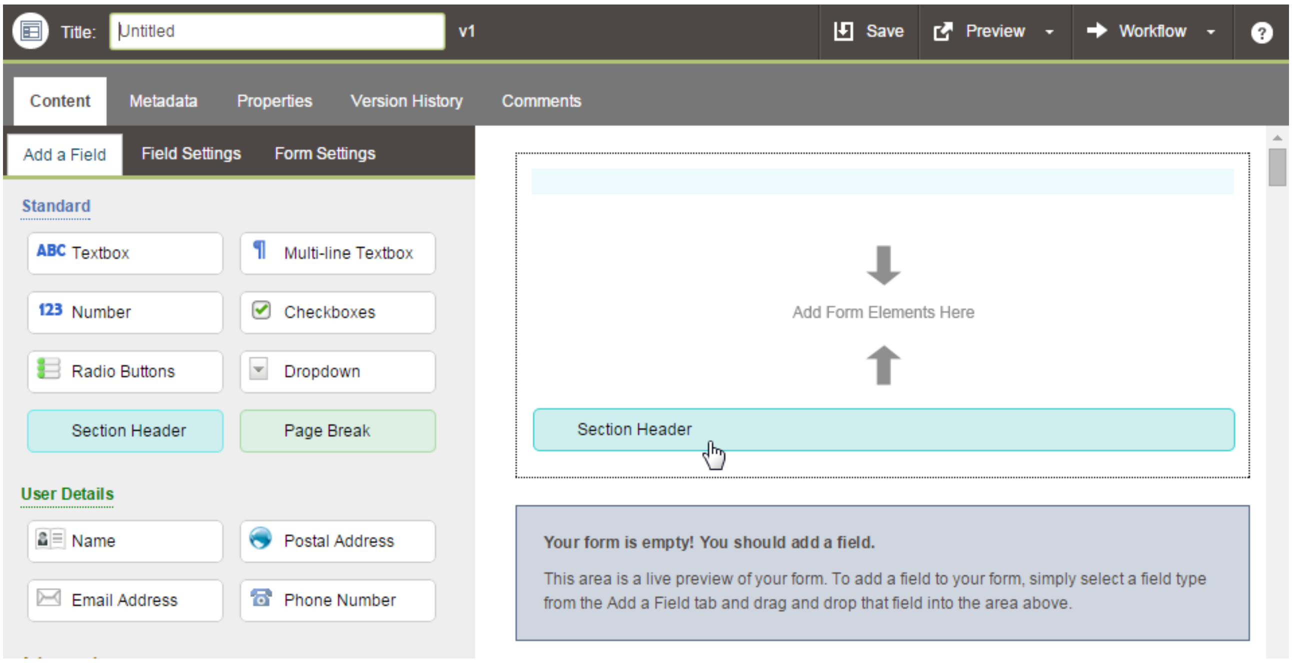
Creating a forms page involves two steps – firstly, the creation of the individual form, and secondly, the addition of the form into a web page.

## Creating a Form

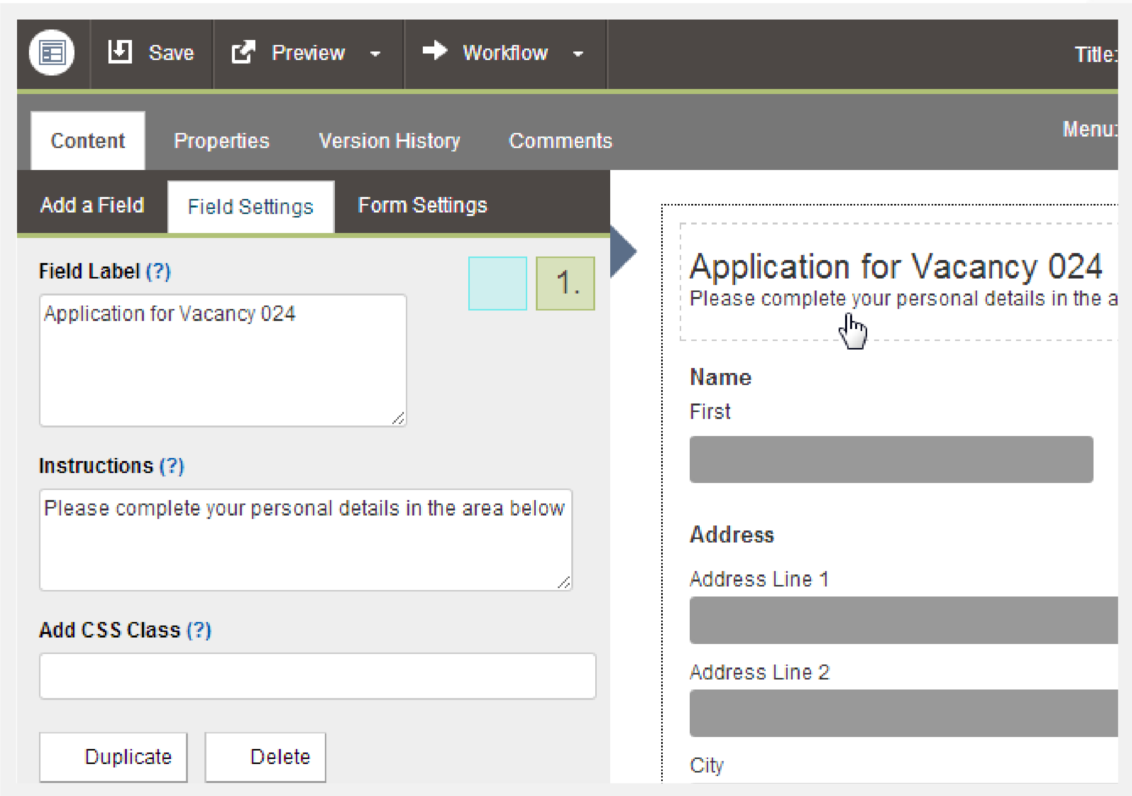
The 'Form' content type must first be assigned to your folder, together with assigned permissions.

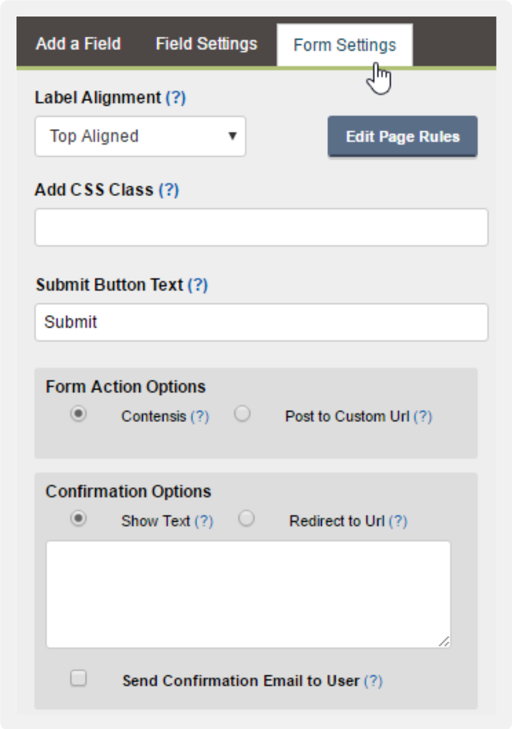
Create the form in the same way as for other content types, by simply following the wizard steps as directed, and then open the form to edit.

Initially, the form will be empty and the first task is to add the form elements by dragging and dropping them into the area as indicated.




Having added the elements that you require, it will then be necessary for you to then set the properties for each of these by clicking on each item. This will then display the '**Field Settings**' area for the selected field.






Set the properties for each of the elements, which will vary depending on the type of form element added, and then finally switch to the '**Form Settings**' tab which will allow you to set the form behaviour and adjust display settings.

## Add the Form to a Web Page

Having completed the initial step, you'll now use one of the form containers that have been developed for the new LSE website design. You can access these containers from the following location in Contensis:

**Components > Form containers**

There are two versions available of the form containers:

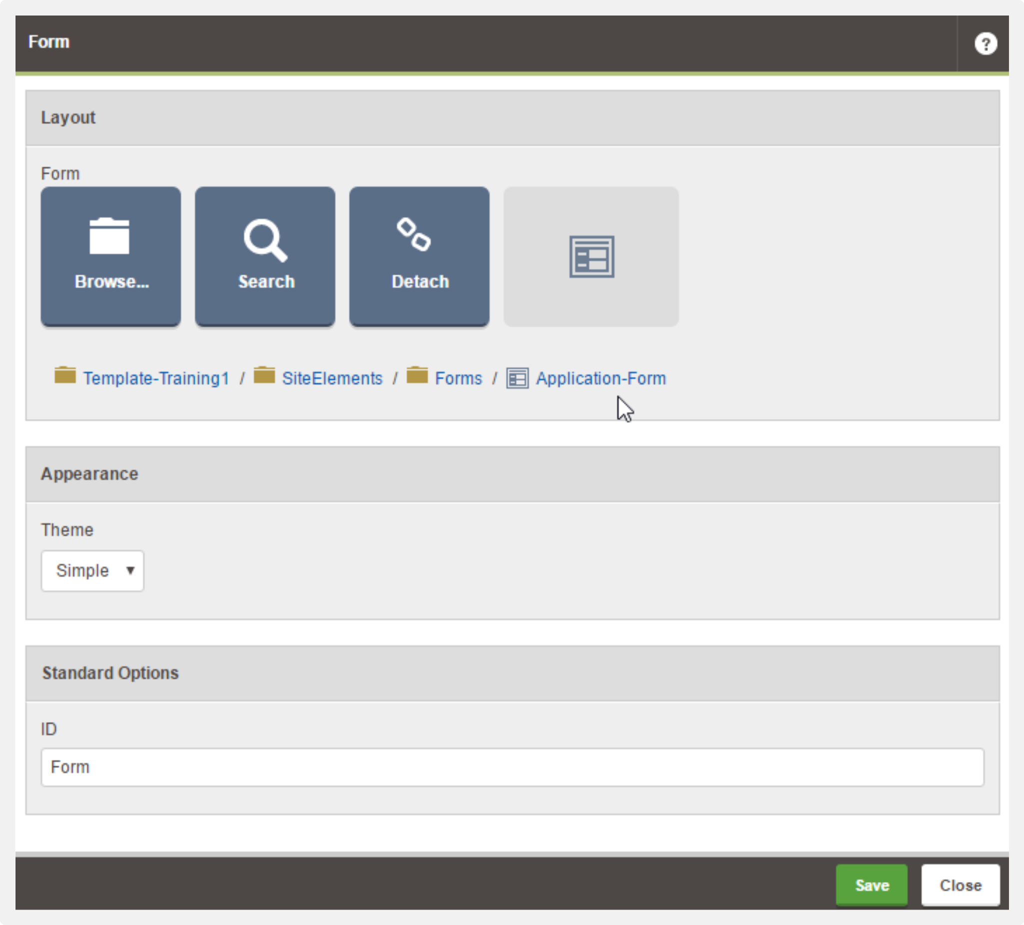
- **Form modal** – recommended for short forms
- **Form modal takeover** – recommended for long forms as it opens in takeover window mode.

Simply drag and drop one of the containers into your webpage, before adding your completed form. The containers have clear, self-explanatory fields. Please refer to the '**Glossary of Components**' in the new LSE templates documentation for further details.

## Properties of the 'Form' control

It is not possible to see from the above view any details relating to the embedded form. For example, we may want to know where the form is located to amend at a later time.

As with other web controls, these details can be accessed by right clicking on the form webcontrol and clicking on the '**Control Properties**' option, which will then display a new window similar to that shown in the following screenshot.




# WORKING WITH IMAGES

You have the same control over images as you have with web pages and documents.

You can replace master images. Simply upload the most recent photo of your summer party and it'll roll out to all places that use it. When submitting your updated image for approval, the old and new images are shown side-by-side for comparison.

## Uploading a New Image

To use images in your project they must first be uploaded to your Contensis Project.

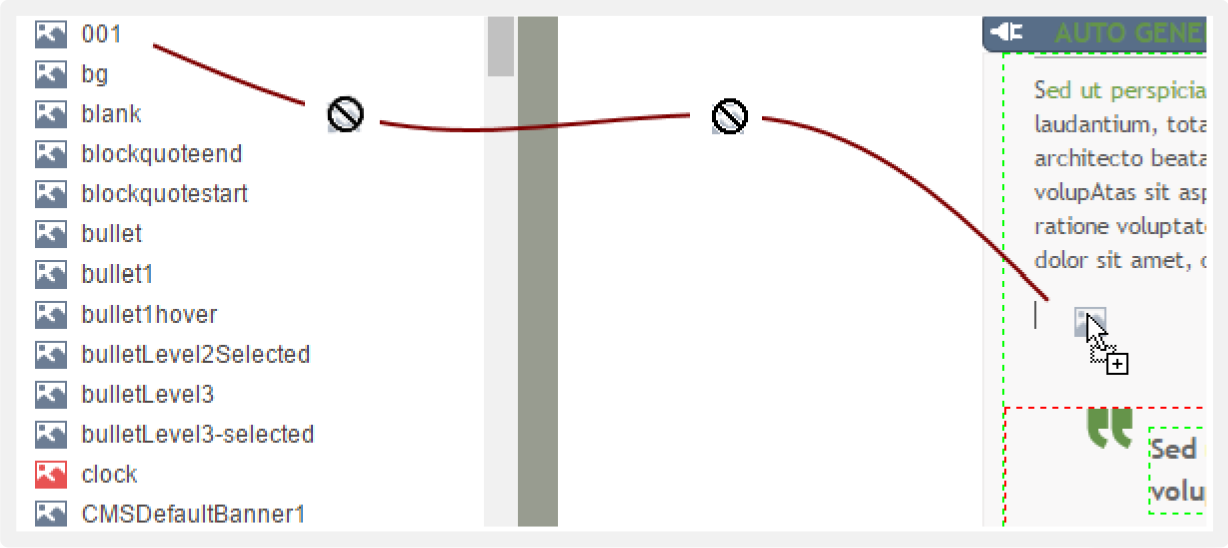
**Note:** Images can only be uploaded to areas that have the correct content permissions. These can be assigned to folders prior to the creation process by administrators, or alternatively, if you have folder admin permissions they can be assigned as part of the content creation wizard process.

## Inserting an Image into a Web Page

After uploading an image into a project, or editing an image in the Image Library, you'll then able to insert it into a web page. There are a number of ways you can do this, the most common method being to use the drag and drop technique.

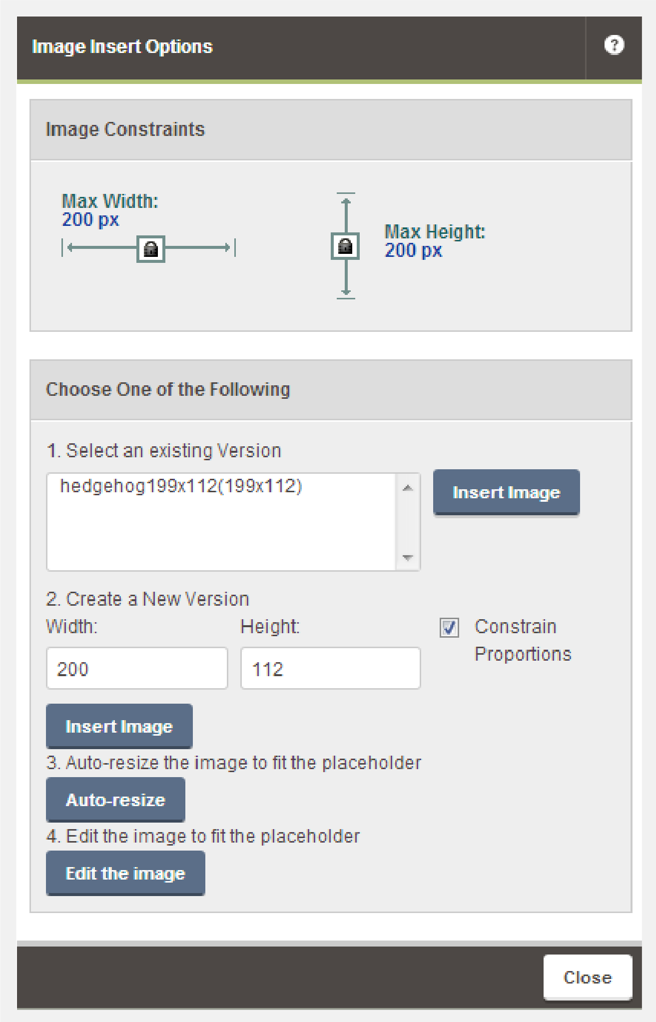
## Drag & Drop from the Project Explorer Tree

1. Open your page to edit in the Editor.
2. Locate the image to be inserted in the Project Explorer tree.
3. Click on the image icon and whilst keeping the mouse button depressed, drag & drop the image to the required location.



## Insert Options

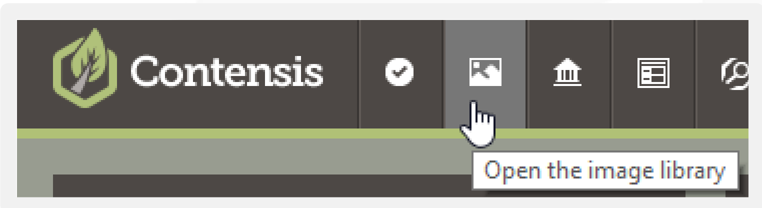
When you drag an image into a placeholder you will be shown the '**Image Insert Options**' window. Here you will be able to see if the placeholder has any size restrictions, together with four insert options.




**The dialogue areas explained:**

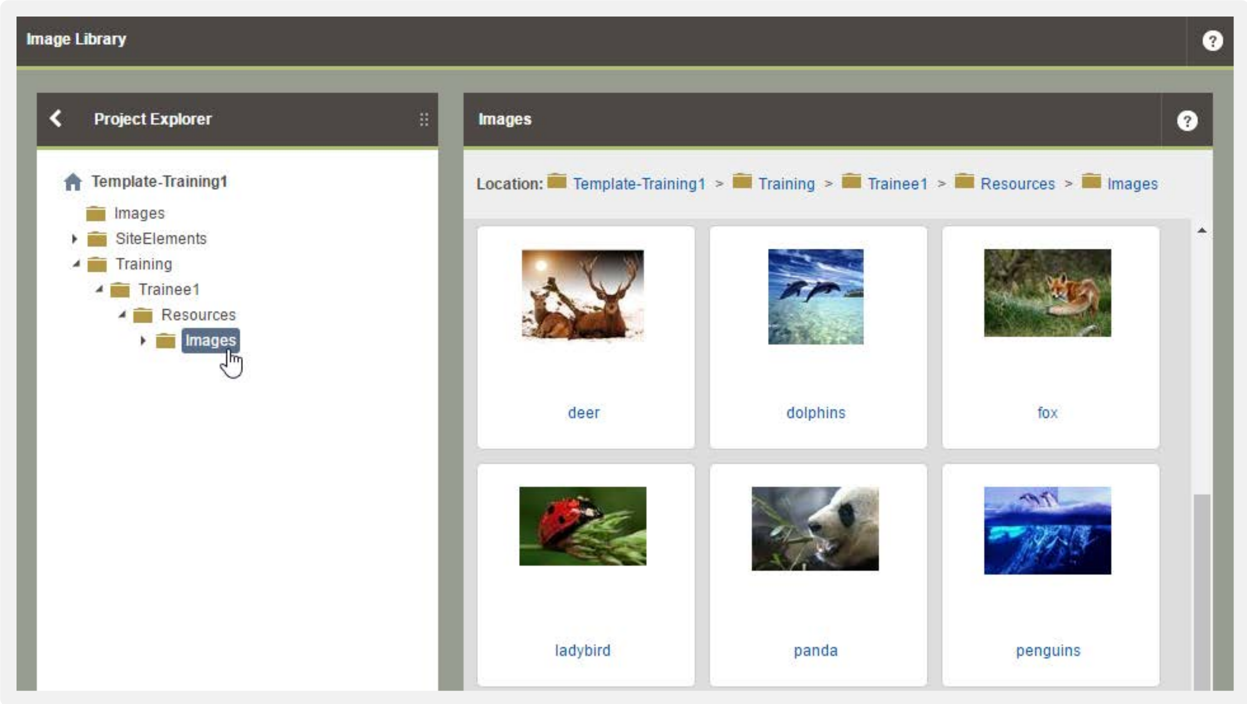
- **Image Constraints** – this area located at the top of the dialogue window, displays any constraints that apply to the placeholder where the image is going to be located. In the screenshot both width and height are set to a maximum of 200px.
- **Select an Existing version** – this allows you to select a previously created size version. Note: the numbers in brackets are the dimensions of the image.
- **Create a New Version** – this allows you to define your own size version to insert. Specify the dimensions in the areas, and then click on the 'Insert Image' button.
- **Auto Resize** – Clicking on this option will automatically constrain the proportions of the image to best fit into the area.
- **Edit the Image** – this option opens the image editor allowing you to manually edit the image. From here you can crop, resize and apply effects to the image.

## Editing an Image using the Image Library

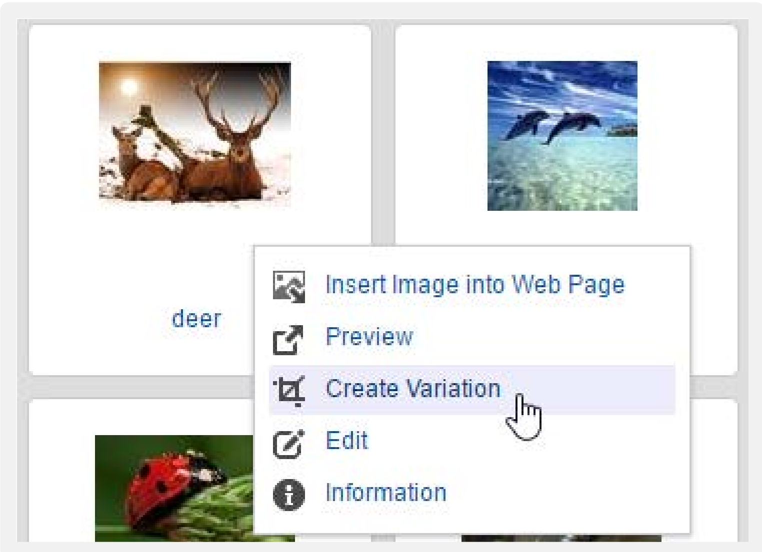



The Image Library can be accessed by clicking on the Icon located on the top toolbar, or by clicking on the 'Edit the Image' button on the 'Image Insert Options' dialogue window, as discussed earlier.

This will then open a new browser window.




Depending upon your permissions you will see a number of folders and images added to Contensis, by means of the Image Library Project Explorer tree located to the left. If you click on a folder in the tree (where there are images present), and where you have permissions to view, you will then see a thumbnail listing display on the right.




Locate your image, and click on it to display the context menu. Then click on the 'Create Variation' option to resize, crop or apply effects to it.

Note: The '**Edit Image**' option only allows for the editing of content (alt text), name, property and version history related areas.

## Cropping an Image

Any image in your Image Library can be cropped using the crop tool.

The cropping tool allows you to select an area from an existing image, which can be used to

- Reduce the overall physical dimensions of an image to improve framing
- Remove unwanted canvas space to accentuate the subject matter
- Tidy the image borders and/or change the aspect ratio.

- **Using the Cropping Mask**
  Open the image in the Image Editor.
  Activate the Cropping Mask by first clicking on the image where you will see the image darkens and a small box appears at the point where the mouse was clicked.  This is the cropping mask.

- **Resizing the Cropping Mask**
  Left click on the cropping mask placed on your image and drag to open the box.  This displays the cropping area (clear) and the anchor points around the box.  Click and drag any of the anchor points on the outline of the cropping mask to change its dimensions.

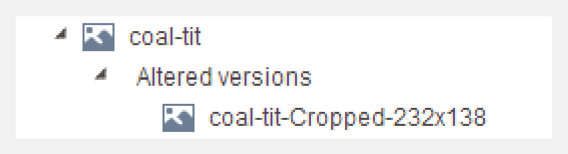
In addition to manually resizing the cropping area, the dimensions can be specified by entering values in the '**Crop Options**' area.

- **Moving the Cropping Mask**
  Click within the cropping area (note that the cursor changes to a cross when positioned in the selection area) and whilst keeping the left mouse button depressed, move the mask around the image to the desired position.

- **Previewing the image**
  You can preview changes at any time by clicking on the '**Preview**' button, which will open up a new window showing the image as it would appear in a web page.


- **Saving**
  To save a copy, click on the '**Save**' button which will then open a new dialogue window with the new image name and 'Alt Text' areas populated. Note that the name field will appear in the format 'coal-tit-Cropped-232x138' where the numeric values are the size of the image.

  Note: The newly created image will appear as an altered version of the original image, as indicated in the following screenshot.



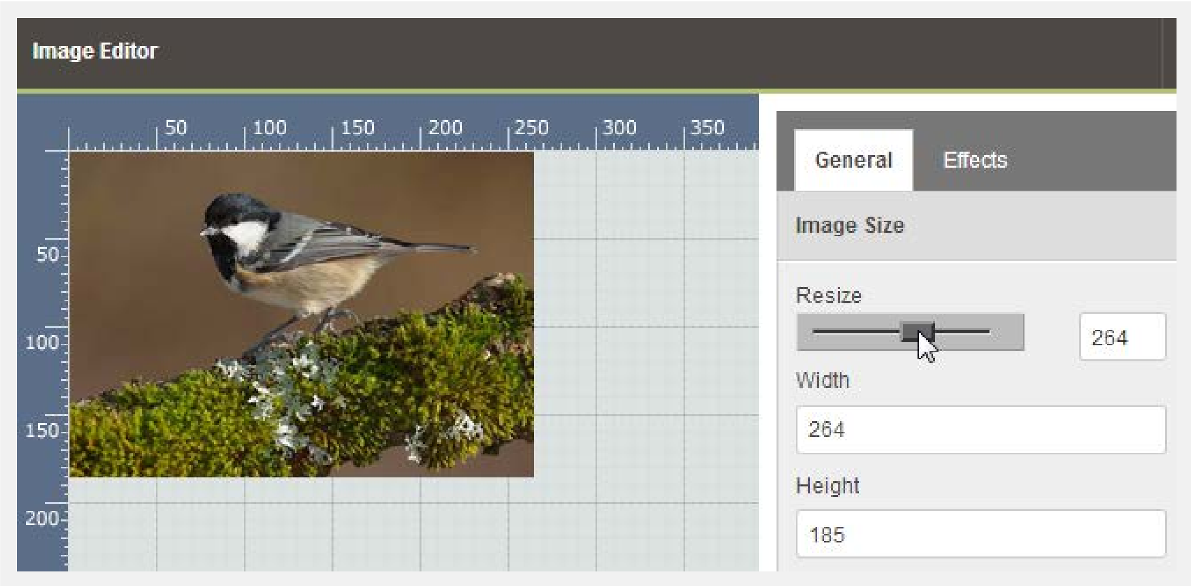

## Resizing Images

As well as creating 'cropped' versions, it is also possible for you to resize images to create new image versions using the Image Editor tools.

### Resizing an Image

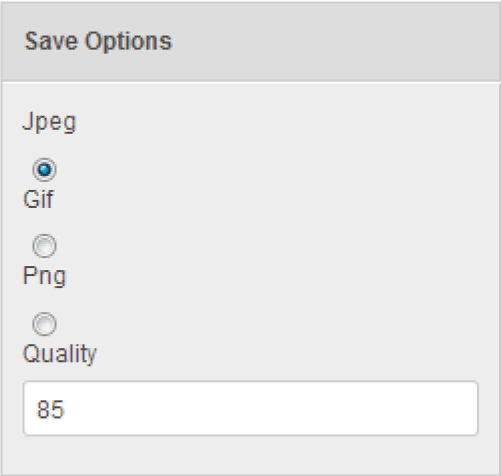
1. Open the image in the Image Editor
2. In the '**General**' tabbed area, click on the resize slider control to alter the size of the image. Use the Image Size slider (top-right of the Image Editor) to scale your image. Alternatively, manually enter the pixel dimensions in the text box areas below.

Note: It is not possible to scale the image above its original dimensions.




3. Preview the changes as before and then finally save the changes by clicking on the '**Save**' button.

## Save Options




If you are saving an image variation as a 'Jpeg' file format, then it is possible to adjust the quality of the image by altering the value from its default of '85'.

The higher the value, then the higher the quality of the image, and it should also be noted that this will also increase the physical file size too.

# CONSOLIDATION EXERCISE 1

1. On your PC: Log into Contensis, and then onto the training site – Using the details provided to you by the Trainer.
2. Go to the Project Explorer tree and find your training folder (e.g. trainee1 / trainee2 etc.)
   Open the folder, and Create a New Page. From the options select a template and name your page: 'Leisure1' / 'Leisure2' etc., (corresponding to your logon number).
3. Open your Page to edit and then change your page title to: 'Contensis Bulletin Board (1 / 2 or 3 etc.)'.
   Type a heading in your Page, and change the Style to 'Heading 2' (Heading 1 can be used if your page template does not already include an 'Auto generated page title' area).
   Add some text of your own into the placeholder, as a means of introducing yourself and make this several sentences in length so that it will produce two or three paragraphs on the published page.
   Use the Cut, Copy & Paste techniques where applicable to build your page content.
4. 'Save' the changes to your page and now 'Preview' it to see the published page.
5. Now 'Submit' this for Approval. Change your mind and Revoke Submission, and then re 'Submit' for Approval.

In this project you are also the Approver of content. So you can, if you wish to, view all Pages awaiting your Authorisation via one of the list options or Dashboard view. Click to 'Approve' your submitted page.
In the space below, write down one of the alternative options that you chose NOT to use for the approval of your page on this occasion.

6. Now open your page for editing again. Continue editing by changing the styles of some of the text (do this by using the 'Style' dropdown menu options).
   Add additional wording, or alternatively, make some existing wording in a paragraph into a heading for example. Now change the text colour of either your Heading or some of the content.
7. 'Save' the changes to your newly edited Page.
8. Now display a Dual View of your current edited version alongside that of the current live version (i.e. the last version that has been 'Approved').
9. Import a Word document into your page (as advised to you by the Trainer).
10. Experiment with some of the page editing tools (Bold/Italic/Underscore; Justify; Bullet/Indent/Outdent; Symbols; Spellchecker and Undo/Redo).
11. If available, Drag & Drop in a module into your page content area. Your trainer will tell you where this is located. When added to the page, populate the placeholder areas with content, images or text as indicated.
12. Copy & Paste a paragraph of text from another Contensis Page, into your new module on your Page.
13. Save your Page.
14. Finally, Approve the changes to the page and then immediately switch to the 'Management console > Publishing Queue' view option to see the item publish to the live server.

**End of exercise.**

# CONSOLIDATION EXERCISE 2

**Using your page created in Exercise 1:**

1. Add another module to your page.
   Select the image placeholder area in the module.
   Using the Image Library button, choose an image that you would like to insert and also manipulate to create different effects.
   Firstly, choose to edit the image, and crop the image to fit the 'Placeholder'. Then ‘Save’ and ‘Preview’ the changes.
   Now remove the image from the placeholder and for the second image to be added, choose the original image you selected (NOT the new 'cropped' version that will have been added). This time use the 'Auto-Resize' option when adding to the placeholder.
   Thirdly, remove the image for a second time, and this time insert a version of your original image that you will now manipulate using some of the filters available in the Image Library. (Try reducing the JPG quality, using 'Emboss' or 'Grey Scale' effects and adjusting the quality setting.)
2. ‘Save’ the changes to your page.
3. From the Project Explorer Tree, view ‘Popups’ of your ‘Live’ Page then your ‘Saved’ editing version.
4. Open your page to edit. Choose a location in your introductory text area where you wish to add a link.
   Type in ‘Link to Page’ and then highlight it. Now select one of the Pages available in the Project explorer tree, and Drag & Drop this onto your chosen selection point on your page.
5. In the section of text that you 'Copy & Pasted' into your page, select a word that you wish to be linked with another CMS web page within this project. Using the 'Insert/Edit Hyperlink’ window insert a link with a second chosen Page from those available to you.
6. ‘Save’ your Page.
7. Insert a table on your Page. Initially create a table of 2 cells by 2 cells. Type in cell 1: Option 1. Type in cell 2: Travel by Road and Rail. Type in cell 3: Option 2. Type in cell 4: Travel by Road, Rail, Air and Sea.
8. Save and Preview your Page.
9. Edit the table you have just created by: Add a row between the two rows already created. Add a column after the right hand column. Enter a few blank spaces in one of the new column cells. Merge the three cells that make up the right hand column. Change your caption for your table, and change your Summary.
10. Save your page.
11. Submit for Approval.
12. Now Approve your page using one of the Approval options.

**End of exercise.**