Content Management System (CMS): Basic Training Guide

The purpose of this documentation is to give a brief overview of how to use the CMS to update and create content for your website.

1. Add quick links to the chrome browser / Log in to the CMS

Below is how you can add some quicklinks as a button on your google Chrome favorites menu bar:

1) Click and drag the link icon shown below onto your bookmarks bar

![Image of bookmarks bar]

2) You can “right-click” on the menu bar item and choose “Edit” to rename it.

![Image of right-click menu]

3) If you don’t see your bookmarks bar do the following:
   - Click the upper-right hand icon in google chrome
   - Select “bookmarks” → “show bookmarks bar”
4) Here are some suggested quicklinks to add for reference. (I would add these links to your bookmarks/favorites):

A quick link to your site is:

http://www.umes.edu/{CHANGE-TO-YOUR-SITE}

CMS Login

http://www.umes.edu/IT/Default.aspx?id=1290

Main (Left-Side) Navigation Manager

http://www.umes.edu/IT/SelectEntity.aspx

Below is a link to some a reference guides which will help explain how to use the CMS to make edits to your website.

http://www.umes.edu/IT/Default.aspx?id=25126

2. Login to the site: Important: You must be logged in to make changes to your site.

1) Navigate over to the IT site via the link below and click the “Login” button on the right-hand side of the screen.
2) Enter your User ID and Password.

Information Technology Site Link:

https://www.umes.edu/IT/Default.aspx?id=1290

3) From there, browse over to the website to make changes to it.
   Browse to http://www.umes.edu/{CHANGE-TO-YOUR-SITE}

4) It is recommended to use the Google Chrome browser for making changes to your website.
5) After you’ve logged in to your site, change the mode to “Switch to edit”

6) Hover your mouse over the content block you want to edit, and then click the “menu” icon and select “edit”

Click “Publish” once you’re finished making your changes and your updated content will be live.

**Alternative way to access your content**

1. Access the CMS Workarea.

   a. In a new browser window, open the UMES IT homepage at [http://www.umes.edu/it](http://www.umes.edu/it).

   b. Locate the CMS login section in the right column of the screen and click **Login** using your UMES network username and password. Upon logging in, the CMS login section reappears with different options – one of which is **Workarea**.
c. Click the “Workarea” button to access the workarea. Upon doing so, a new browser window will open which becomes the CMS Workarea.

2. About the CMS Workarea.

a. Functionality and Layout

   i. Global Functional Tabs (Upper Left-Hand Tab Bar):

   ![Global Functional Tabs]

   This area is reserved for offering the ability to switch between the global functions of the CMS Workarea.

   1. Note that your level of access to these functions will be determined by access privileges granted to you by the Web Administrator.

b. Access to Your Site’s Content:

   Click the Content tab to access the content of your site, and locate the folder designated to your department’s website by the Web Administrator.

   i. Locate your site’s folder by accessing the content of the CMS and navigating through it.
   ii. After logging into the CMS and opening the Workarea, click on the Content tab in Global Functions Area. See the Tab-Bar above.

   1. Traverse through the appropriate top-level folders to locate your site’s folder. Note that you may only expand the folders of which your account has been granted permissions by the Web Administrator.

   2. After locating your site’s folder, select it by clicking the folder’s name. The right-hand section of the page will update with a list of the content items contained in your site’s folder.

3. Edit an Existing Content Item.

a. Click on the “HTML Content” item that you wish to edit.
b. Click “EDIT”

The Content Management System (CMS) provides a wide range of capabilities which allow you to create reference materials to help guide you through the most common support issues with your website.

c. Click inside the web editor and enter your new text to add.

This is my additional text to add. The Content Management System (CMS) provides a wide range of capabilities which allow you to create reference materials to help guide you through the most common support issues with your website.

d. Optionally, you can select and highlight the text and use the options at the top of the editor to change the text style. For example, you can apply an orange color to the text as well as make it bold and/or underline.

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*This is my additional text to add* Content Management System (CMS) provides a wide range of capabilities which allow you to create reference materials to help guide you through the most common support issues with your website.
```

e. Click “PUBLISH” once you are ready for your changes to be made “Live” and viewable on the public web. You can click save instead of publish and your content will remain in a checked-out state until it’s published. This is useful if you need to take a break from editing and finish it later.
4. Preview and Existing Content Item.

   a. After selecting your site’s folder, click the existing content item you wish to preview. Note that upon clicking, a general preview of the content item will appear in the right-hand section of the screen.

   b. Click on the “Preview” icon in the toolbar at the top of the general preview. A new window will appear displaying this content in its proper context per the department’s website.

5. Add a New Content Item.

   a. After selecting your site’s folder, click on the “New” icon in the toolbar and select HTML Content. A blank edit session will open.

   b. Enter a title for this new content item in the Title text box.

   c. Add the necessary content to the blank space provided below. Note that the content added here constitutes what will be seen on your website. There are two ways to enter content: Design and Source Code.

      i. **Design** (click ): Enter content as it will appear when viewed on the web. This is similar to using a desktop publishing application (i.e. Microsoft Word).

      ii. **Source Code** (click ): Enter content in HTML format. This allows you to directly manipulate the code that produces what appears when the page is viewed on the web; and provides more freedom to customize your page.

   d. Publish, Check In/Save, or Cancel the addition of this content item to complete.
i. **Publish** (click ![Publish](image)):

Post this new content item as *Live*. All the content you’ve entered since this edit session began will be viewable on the web.

ii. **Check In/Save** (click ![Save](image) or ![Check In](image)):

Saves the progress of your work on the content item so that it can be completed later. None of the content you’ve entered since this edit session began will be viewable on the web.

iii. **Undo Checkout (Cancel)** (click ![Undo](image))

Cancels the edit session and returns you to your site folder/content list.

6. **Delete an Existing Content Item.**

   **NOTE:** Only individuals who have been granted delete permissions to your content may perform content deletions.

   i. Click on the “Delete” icon in the toolbar and select **Content**. A new window appears listing the selected folder’s existing content. Note that candidates for deletion are only those which are not currently **checked out**. Items checked out indicate that they are currently being accessed and worked on by another individual or that they were closed improperly.

   ii. Click the checkboxes beside all the content items you wish to delete to select them for deletion.

   iii. Click the “Delete Content” icon ![Delete Content](image) to delete; and confirm deletion by clicking **OK**.

7. **Inserting / Editing Images**

   a. Click in the web editor where you would like to insert a picture. Then, click the “Library” Icon at the top of the editor.

   b. The Library tab will load in a new window.

   c. Make sure you’re under the correct folder where you would like to upload your picture.

   d. Make sure the “Images” option is selected in the drop down.

   e. Click “ADD LIBRARY”
f. Click “Choose File” and browse to the file you want to upload.

g. Double click the file you want to upload or select the file and Click “Open”
h. Give the image a “Title” and click “ADD LIBRARY” (Optionally, you can give the image a description.)
i. Right-Click the image and select “Set Image Properties” OR “Image Modification Tool” to change the width / height, crop the image etc.

j. Select and highlight the image and use the alignment icons at the top of the editor to move the image.

k. You can remove an image by selecting the image and pressing the “Delete” key on your keyboard.

l. The “Library Tab” will display each image which has been uploaded to the corresponding folder. You can repeat this process to add additional images or click on any image already added to the library to add it to your page.
8. Uploading Documents

1) Make sure you’re on the “Content” tab of the CMS Workarea and select your site folder and click on New > DMS Document

2) Give the image a ‘Title’ and ‘Browse’ to your Content / Document

3) Click the PUBLISH button.

4) You can repeat this process to add additional documents.

9. Inserting Hyperlinks to images, documents, etc.

a. Click in the editor where you would like to insert a hyperlink.
b. Select the text that you want to become your link and click the “Hyperlink Manager” icon.
c. Enter a valid web address in the “URL” field and click “OK”

d. The text you highlighted becomes a clickable link.

e. You can link to other CMS web content by clicking the ellipsis icon in the hyperlink manager window.

f. Select the folder containing the web content you want to link to.

g. Then change the drop down to “Quicklinks” which will display the web content you have added to the site. Additionally, you could link to a file, form, or even an image if you desired.
h. Click on the web content you want to link to (it will highlight yellow once selected) and click “INSERT”

i. You will see that the “URL” field has been populated with the correct web address in order to link to the content you selected above.
j. Click “OK”

10. Inserting / Editing Tables

a. Click in the editor where you would like to insert a table to display your data.
b. Click the “Insert Table” Icon and drag your mouse over the cells to create a table structure – Click a cell to insert the table. (Example below shows a 2 x 2 table)

c. The table will be inserted into the editor in the layout which you selected above. You can type text / insert images in each of the table cells.

d. You can use the additional table editing icons to set other properties of the table and format it as desired.
11. Removing Temporary Content Markers

a. The web editor by default shows temporary content markers to aid in showing where new paragraph (HTML tags) are created. This helps to show where you might need to place the cursor in order to use properties such as alignment when editing your content.

b. However, if you would like to remove these markers, you can click the temporary marker icon at the top of the editor shown below. You will then be able to view the content without the markers being displayed.

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### Content Management System (CMS) Documentation

<table>
<thead>
<tr>
<th>Title</th>
<th>Documentation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMS General Use Reference</td>
<td>![Image]</td>
<td>Use this document for reference on general usage on the Content Management System.</td>
</tr>
<tr>
<td>CMS Web Editor Reference</td>
<td>![Image]</td>
<td>Use this document for reference on using the CMS Web Editor.</td>
</tr>
</tbody>
</table>
12. Updating main left-side menu navigation

You can manage the left-side menu navigation through this link below
https://www.umes.edu/IT/SelectEntity.aspx

Which allows for the ability to edit the left-side navigation to the site.

1) You would click the link above and enter your UMES login as shown below and password

Sitemap Builder 3.0

2) Select the site you want to edit (Example shown below) (You would select your site)
3) Click on the item you want to move / edit and you can use the arrows below to move them accordingly.

4) To add a new Item: Click the folder at the top
5) The “Add Submenu” box will appear

6) Click on the item you want to add under “Your CMS Folder Tree” and take note of the “Title” and “URL” fields that appear.
7) Copy and paste the text of the “Title” and “URL” fields of the “Add CMS Item” box into the “Title”, “Desc” and “URL” fields of the “Add Submenu” box. (See below)

8) Once you’re done editing the menu, click the Log Out button near the top of the page.