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LOGGING IN TO THE CMS

1. Go to the CMS website: http://wcms-stage.ad.mta.ca:8080/auth

   **Please note:** Safari is not a supported browser. Use Firefox, Chrome, or Internet Explorer.

2. Click on “login.” Enter your MtA username and password.

   **Please note:** If you wish to log in off campus, you must be connected to Mount Allison’s virtual private network (VPN).

3. Click on “workarea.” A new screen will pop up.

4. Choose “Content” from the menu at the top of the new screen.
FOLDERS

Each page on your site should have its own folder.

To create a new folder:

1. Click once on the folder under which you wish to create your new page.

2. In the menu bar, click “New,” then choose “Folder.”

1. In the new page that appears, enter the name of your folder in the Name textbox, under the Properties tab. The name of your folder should be the name of your page. **Use only numbers and letters in the name of your folder** — it will become part of your URL. **Capitalize only the first letter of the title**, unless it is a proper name or the name of a department.

2. Click on “Add Folder.”
CREATING A WEB PAGE

Once you have created a folder for your page, there are two steps to create a web page:

   **STEP ONE**: Create your content section
   **STEP TWO**: Build your page by connecting your content to a smart form

**STEP ONE**
Create your content section:

1. Click on the folder of the page you wish to create to highlight it.

2. In the menu, click **“New,”** then choose **“HTML Content.”** This will open a new content page.

3. Give the page a **title.** Use the name of your page plus the word **“content”** — i.e. “Programs content”.

![Image of CMS interface showing how to create a new content page](image)
4. Make sure the “Content” tab is highlighted at the top of the page.

5. Add your content in the large text box. For content tools, see p. 29.

   Please note: Do not copy text directly from another web page or a word processing program like Word.

   Instead, first copy your text into a plain text editor such as Notepad (for a PC) or TextEdit (Mac), then copy the text from the plain text editor into your content section. This will remove any problematic formatting.

   If you are using TextEdit, make sure it is set to plain text by looking under the “Format” tab. One of the menu items should be “Make Rich Text.” If it says, “Make Plain Text”, click on it to change to plain text before copying into the CMS.

6. SAVE: save your work frequently using the “Save” button at the top left of the page.

7. To leave the page choose either:

   • CHECK IN: To save your work and leave the page without publishing it.
   • PUBLISH: To publish your work to the website.

   Always click on either CHECK IN or PUBLISH when you leave a page.

8. You must PUBLISH your content in order to move on to the next step.
STEP TWO
Use a smart form (template) to build your web page:

Departmental websites will use two types of smart forms:

1. **2nd Level Content** — to be used as a department landing page only

   A landing page is essentially the homepage of your department’s website. The Marketing & Communications Office will supply the ‘2nd Level Content’ pages for all departments. The text on this page can be edited; however, the header image is a global property of the Mount Allison site and cannot be changed by the departments. If your department would like to change the header image, please contact the Marketing & Communications Office.

2. **3rd Level Content** — to be used for all interior content

   The rest of your web pages should use this template
Using the 3rd Level Content smart form

1. Click on the folder of the page you wish to create to highlight it.

2. In the menu bar, click “New”, “Smart form”, then “Comm-site 3rd Level Content.”

This will open the 3rd Level Content smart form:

**Page title:** This will appear in internet browser windows, in your page menu, and become part of your URL.

**Page header title:** This will appear in the garnet bar at the top of your page.

**Body content:** Insert the content section you created in step one.
3. Enter the **page title** in the box at the top of the page. Use the same title you will use on the page itself, but use only numbers and letters in this box as it will become part of your URL. **Capitalize only the first letter of the title**, unless it is a proper name or the name of a department.

![CMS Interface](image)

4. Under “**Page Header**”, in the “**Title**” box, enter the title of your page exactly as you want it to appear. (Using punctuation is fine in this box.)

![CMS Interface](image)

5. Under “**Page Content**”, attach your content by clicking on the plus sign in the “**Body Content**” section, then clicking on the yellow folder that appears.
6. A new window called “Select Content” will appear. Find the folder where your HTML Content was saved in the folder structure. The list of content you created in that folder will in the right hand side of the window.

**Click on the appropriate content** to highlight it and hit “OK” at the bottom of the page.

7. **Insert your page menu:** your menu will appear across the top of each page.

The menu itself will be created by the Mount Allison web team, however you need to point to the correct menu from your web page.

   a. To insert your menu, click on the ‘Metadata’ tab.
   b. Under ‘Side Menu’, click the ‘Edit’ button.
c. A new window will open where you can select your menu from a list
(your menu is the name of your department).
d. Click on the name of your menu once. It will appear in the bottom of the
window.
e. Click the “Save” button to save your selection.
f. Click on the “Content” tab (in the same menu bar as “Metadata”) to
return to the main smart form.

8. Save your work by clicking on the “Save” button at the top of the page, then
click the “Preview” button to preview your page. (See more on previewing on
page 12.)

Once you are satisfied, click on “Publish.”

Please note: Your changes will not appear online immediately. The website updates
every hour on the hour.
PREVIEWING YOUR PAGE

There are two ways to preview your page.

1. **Using the preview function.**

   The preview function is most useful when you want to preview changes without publishing them.

   In order to open the preview window, you must:

   a. Go to the smart form for the page you wish to view. (You will have to check in the content you are working on.)
   b. Click on Edit.
   c. Choose the “preview” icon next to the Save button.
   d. This will open a pop up preview window where you can see what your page looks like. Changing the size of your window helps give you an idea of how the formatting on the page will change for a tablet or a smart phone.
   e. In order to save yourself from going in and out of the smart form, you can leave the preview window open and right click (on a PC) or Ctrl+click (on a Mac), then choose refresh to see your updates as you work. (You will need to check in the content page on which you are working to see the updates and you may need to hit refresh more than once.)

2. **Using the “staging alias”.**

   This preview only works on changes that have been published. However, it does open up in a regular browser window, so you can navigate around the page more easily than in the preview window. If you have plenty of time before the top of the hour, when your changes will go live, you may find this a preferable option.
To view the page in staging:

a. To verify that all of your content pieces are published, click once on your folder to view the list of the content. Under the column labelled “status”, “A” means the content has been published. “I” stands for checked in, while “O” means it is checked out to the user listed in the “Last Editor” column.

b. Go to the smart form for the page you wish to view.

c. Click once on the form, but instead of opening it using the Edit button, click on the “Aliases” tab at the top of the page.

d. **Click on the URL for the page.** The page will open in your browser window. This is what your page will look like when the changes go live. Changing the size of your window helps give you an idea of how the formatting on the page will change for a tablet or a smart phone.
EDITING YOUR WEB PAGES

1. Find the page you wish to work on in the folder system at the left.

2. View the contents of the folder by clicking on it once.

3. Find the page you wish to edit in the displayed list. Open the “HTML content” piece by clicking on the title once.

4. Click on the “Edit” button at the top of the page to edit the content.

5. When you are finished making your changes, then either:
   - **CHECK IN**: To save your work and leave the page without publishing it.
   - **PUBLISH**: To publish your work to the website.

Always click on either CHECK IN or PUBLISH when you leave a page.

Please note: Your changes will not appear online immediately. The website updates every hour on the hour.
FONTS

There are four styles of font, font size, and font colour to choose from. The default is a gray, standard-size font, which should be used for most text.

The other three styles can be used to help make your page more dynamic and easier to read.

- **Callout_title** is a larger size garnet font, useful for highlighting the first line of your text or for subtitles

  *Sed ut perspiciatis unde omnis*

- **Callout_title2** is a larger size gray font, useful for highlighting the first line of your text or for subtitles

  *inventore veritatis et quasi*

- **Subtitles** is a garnet font that is the same size as the standard gray font, useful for subtitles/paragraph headings

  *Nemo enim ipsam voluptatem*

Applying a style

1. Highlight the text to which you wish to apply the style.
2. From the drop down menu “**Apply Style**” choose the style you want to use.
3. To remove or change the style, highlight the text and choose “**Clear style**” from the drop down menu.
ADDING LINKS

You can link to other pages within the Mount Allison website or to exterior sites.

NOTE: By default, links open in the same window. If you wish the link to open in a new window (appropriate for external links — sites outside of Mount Allison), then within the Link Manager window, from the “Target” drop down menu, choose “New Window.”

CREATING A LINK:

1. **Highlight the text** you wish to turn into a link or **click once on an image** to highlight it.

2. Click on the “Hyperlink Manager” button in the tool bar. The “Link Manager” window will appear.

Now follow the steps below for the type of link you wish to make.

For an external link:

1. Type the web address of the site you wish to link to into the URL text box, then click the OK button.
For an internal link:

1. Click on the button next to the URL text box to go to the Library. A window called “CMS400 Library for (your name)” will appear.

2. Choose “Quicklinks” from the drop down menu.

3. Use the folder system on the left to locate the folder where the page you want to link to is located. Click on it once. A list of content will appear.

4. Click once on the title of the page to which you want to link (your selection will turn bright yellow). Make sure link to the ‘smart form’, and not the ‘content’ page. You will be able to distinguish between them by their titles. (The content page will have the word “content” in the title.)

5. Click the “Insert” button. The library window will close. (NOTE: If you are given the choice between a manual or automatic alias, choose the automatic alias.)

6. Click “OK” in the Link Manager window. Your highlighted text should now have an underline below it, indicating an active link.
ADDING IMAGES

Please note: Images should be resized before they are uploaded to the content management system. The maximum width for a photo is 1,000 px on a page that does not have a sidebar and 700 px on a page that does have a sidebar.

1. Place your cursor on the left hand side of the page at the level where you wish the image to go.

2. Click on the “Library” icon in the toolbar.

3. A new window will pop up called CMS400 Library for (your name).

4. Make sure ‘Images’ is selected in the drop down menu (this is the default), then click on “Add Library”.

5. Add a title for your image. This title is the default alt tag (more on alt tags on page 19) for the image, so try to use something that can stand alone if need be.

6. Click on the “Browse” button to find the image you wish to use. Highlight the image by clicking on it, then hit “Open.”

7. Click on the “Add Library” button again.
8. To wrap text around your photos, right click on the image (or Control+click on a Mac) and choose “Set image properties” from the menu. A new window called “Image properties” will appear.

a. Click on the arrow in the “Image Alignment” box to choose the alignment of your photo.

b. The recommended “Horizontal spacing” and “Vertical spacing” is 10 (this will add space between your picture and your text).

c. In the “Image Alt Text” box, enter the text that users will see when they roll their cursor over the picture. This is also what adaptive software will read to the visually impaired, so choose text that describes the photo.

d. Click “OK.”
ADDING PDFs

We encourage users to **avoid using PDFs** as much as possible.

1. Highlight the text you would like to link to a PDF.

2. Click on the “Hyperlink Manager” icon in the toolbar. The Link Manager window will open.

3. Click on the button next to the URL text box to go to the Library. A window called “CMS400 Library for (your name)” will appear.

4. Choose “Files” from the drop down menu.

5. Click on the “Add Library” button.

6. Add a title for your PDF.

7. Click on the “Browse” button to find the PDF you wish to use, then click on the “Open” button.

8. Click on the “Add Library” button again. The library window will close.

9. Click “OK” in the Link Manager window.
NOTE:
Once a PDF is uploaded, it remains in the CMS Library. You should only upload a PDF once, then continue linking to the same file from other pages if necessary.

Should you need to update the file, you should overwrite the existing file, which will automatically update all your links. You can also choose to delete the old file and upload the new one.

It is important that you either delete or overwrite old files as otherwise they remain accessible on the web, even if you are no longer linking to them. (Users may find them when using the search function.)

OVERWRITING A FILE

1. Click once on the link to the file to highlight it.
2. Click on the “Hyperlink Manager” icon.
3. Click on the button next to the URL text box to go to the Library. A window called “CMS400 Library for (your name)” will appear.
4. In the drop down menu next to the “Add Library” button, choose “Files.”
5. Click once on the file you wish to overwrite to highlight it.
6. Click on the “Add Library” button.
7. Do not add a title — you will be keeping the current title of the document.
8. Click on the “Browse” button to find the PDF you wish you use. Highlight the document by clicking on it, then hit “Open.”
9. Click on the “Overwrite” icon at the top of the screen. A pop up will warn you that you are about to overwrite a file. Click “OK.” The Library window will close.
10. Click “OK” in the “Link Manager” window.
ADDING SIDEBARS

Sidebars are created with the help of special smart forms.

The available sidebars are:

- Links (p. 24)
- Find out more (p. 24)
- Announcements (p. 24)
- Quick facts (p. 26)
- Story/Related story (p. 27)
- Share the story/page (p. 28)

STEP 1: Create a sidebar smart form

1. Click on the folder of the page for which you wish to create a sidebar.

2. In the menu, choose “New,” then “Smart form,” then choose the smart form for the type of sidebar you wish to create.

3. **Give the page a title.** Use the name of the page plus the word “sidebar” — i.e. “Programs sidebar.”
4. **Add your sidebar content** (see pages 24-28 for instructions for each type of sidebar.)

5. Save your work frequently using the “Save” button at the top left of the page.

6. When you are finished working on your sidebar, either:

   - **CHECK IN**: To save your work and leave the sidebar smart form without publishing it.
   - **PUBLISH**: To publish your work to the website.

   Always click on either CHECK IN or PUBLISH when you leave a page.

7. You must PUBLISH your sidebar in order to move on to step two.

**STEP 2: Attach the sidebar to your smart form**

1. Find the page to which you want to add the sidebar in the folder structure at the left of your screen.

2. Open the page’s **smart form** by clicking once on the title, then clicking “Edit”.

3. Under the “Page Content” section, add your sidebar by clicking on the plus sign in the “Sidebar Content” section, then click on the yellow folder that appears.

4. A new window called “Select Content” will appear. Find the folder where your sidebar is saved in the folder structure. The list of content you created in that folder will appear on the right hand side of the window. Click on the sidebar to highlight it and click “OK” at the bottom of the page.
LINKS, FIND OUT MORE, AND ANNOUNCEMENTS SIDEBARS

1. **Add the title** of your sidebar in the “Title” box. Use the name of your page plus the word “sidebar” — i.e. “Programs sidebar”.

2. Repeat the name of the page in the second “Title” box.

3. Under the word “Link” you will see two icons. Click on the one on the right.

4. A new window called “Link Manager” will pop up.

5. Add the URL of the page to which you wish to link in the URL box at the top of the page (or follow the instructions for linking to an internal page on page 17 of this guide.)

6. In the box called “Link Text” type the text you wish to appear in the sidebar.

7. Click on “OK” at the bottom of the window.

8. If you want to add another link, click on the plus sign icon under your initial link, then repeat steps 3 through 7 for each link that you create.
9. If you wish to insert a link above or below a link you have already created, click the icon to the left of the existing link and choose “Insert Above” or “Insert Below”.

You can also use this icon to **move an existing link** up or down the list, or to **remove** it all together.

10. The CMS will not let you save the page if you have a blank link. You must either enter a link or remove the blank one from the list using the instructions in step 9.

11. You can now move to Step 6 in “Adding a sidebar” on p. 23.
QUICK FACTS SIDEBAR

1. **Add the title** of your sidebar in the “**Title**” box. Use the name of your page, plus the word “sidebar” — i.e. “Programs sidebar”.

2. In the “**Heading**” box enter the title of your quick fact. This will appear in garnet (i.e. “Established”).

3. In the “**Text**” box enter your quick fact that will appear under your heading (i.e. “1839”).

4. To enter another quick fact, click on the icon to the left of the word “**Fact**.” Choose to **insert the fact above or below** the existing fact. You can also **move the fact** you are working on up or down or to remove it completely.

5. The CMS will not let you save the sidebar if you have a blank fact. Either enter a fact or remove the blank one from the list using the instructions in step 4.

6. The “**Additional Facts**” section at the bottom of the page gives you the option of adding a link to direct users to more detailed information. To include a link, click on the icon next to “(FIND OUT MORE)”.

7. The “Link Manager” window will pop up.

8. Add the URL of the page to which you wish to link in the URL box at the top of the page (or follow the instructions for linking to an internal page on page 17 of this guide.)

9. Click “**OK**” at the bottom of the window.

10. You can now move to Step 6 in “Adding a sidebar” on p. 23.
STORY & RELATED STORY SIDEBARS

The Marketing & Communications Office posts feature and news stories at www.mta.ca/stories and www.mta.ca/news. Departments can link to these stories from their website using this sidebar.

1. **Add the title** of your sidebar in the “Title” box. Use the name of your page, plus the word “sidebar” — i.e. “Programs sidebar”.

2. In the second “Title” box, enter the title of the story to which you will be linking.

3. Under “Thumbnail”, click on the yellow image symbol to select a thumbnail using the “Library”.

   The thumbnail needs to be **177px by 120px** and should reflect the image that is used in the story. *(See steps 4-7 on p. 18 for more information on how to add an image to the library.)*

4. In the “Brief” box, enter a short description of the story to which you are linking (a short sentence or a headline).

5. Under “Link”, click on the icon to open the **“Link Manager”** window where you can enter the URL of the story to which you are linking. *(See instructions on adding links on page 16-17.)*

6. You can now move to Step 6 in “Adding a sidebar” on p. 23.
SHARE THE STORY AND SHARE THE PAGE SIDEBARS

This sidebar offers the opportunity for visitors to share a link to the page they are viewing on their personal social media pages.

1. For this sidebar simply **add a title** in the “Title” box. Use the name of your page, plus the word “sidebar” — i.e. “Programs sidebar”.

2. You can now move to Step 6 in “Adding a sidebar” on p. 23.
CONTENT TOOLS

At the top of each content page you will find a tool bar with a number of tools you can use to help you format your content.

Here is a brief description of some of these tools:

Select all: Highlights all of the content on your page.
Cut: Deletes all highlighted material from the page and saves it to the clipboard so it can be pasted elsewhere.
Copy: Copies the highlighted content so it can be pasted elsewhere.
Paste: Pastes previously copied content to your page.
Paste from Word and Paste Plain Text: See page 5 for more information. This is not the preferred way to copy from a Word document as it often adds unwanted spacing to your text.
Find and Replace: A tool that can help you search out and replace particular words or phrases.

Undo: To undo the last change you made. (Ctrl+Z or Cmd+Z also works)
Redo: To restore the change you just undid.
Spellchecker: Checks spelling in your document.
Insert Bookmark: Bookmarks are useful for longer pages of text. They allow you to create a link at one place in the page that take you to another place in the same page (i.e. a “Back to Top” link or an index at the top of the page)
Hyperlink manager: Used to insert a link on the page. Place the cursor where you wish the link to go and click on the hyperlink manager button. Enter the URL of the page you wish to link to in the “URL” box. Click OK.
Remove hyperlink: Removes a link you have created.
Library: Used to add images and PDFs. (See further explanation on pages 11-12)

Horizontal Rule: Creates a horizontal line to separate areas of content on the screen.
Insert Symbol: Allows you to insert certain symbols on the page, including accented letters and certain math symbols.
Insert/Remove temporary markers: Gets rid of the circles that serve as place markers on your page.
Apply Style: Highlight the text you wish to apply the style to and choose the style you wish to use from the drop-down menu. To remove the style, highlight the text and choose “clear style” from the drop-down menu.

**Bold**: To bold your text.
**Italics**: To italicize text. (Use sparingly as it is hard to read online.)
**Underline**: To underline text. (Avoid using as it is usually mistaken for a link.)
**Superscript**: Highlight the text you wish to superscript and click once on the button.
**Subscript**: Highlight the text you wish to make subscript and click the button.

**Numbered List**: Creates a numbered list
**Bullet List**: Creates a bulleted list.
**Outdent**: Removes the indent from an indented line or paragraph.
**Indent**: Indents a line or paragraph.
**Align Left**: Aligns content to the left.
**Align Centre**: Centres content.
**Align Right**: Aligns content to the right.
**Justify**: Makes each line of text of equal length.

**Table Wizard**: Allows you to create tables. Highlight the size of the table you would like and double click. Once your table is created, there are tools in the table wizard to help you modify the table. The tools also appear in the tool bar to the right of the “Table Wizard” button.

**Note**: Tables are not mobile-friendly. Please avoid using this function.
TROUBLESHOOTING

My page isn’t loading

In order for your page to appear online, each piece of content must be “published.”

To check this, click on the folder of the page you are having trouble with. You will get a list of all of the content in that section. Look in the “Status” column.

• “A” means the piece of content has been “Published” and is ready to go online.
• “I” means the piece of content has been checked in, but has not been marked “Published.”

All pieces of content must have an A status in order for the page to work.

To change the status of your content:

1. Click on the title of the piece of content you wish to change the status of.
2. Click on the “Publish” icon next to the “Edit” button.

It is good practice to double check and make sure there isn’t a good reason why the content hasn’t been published yet. Take a look to make sure the content is complete before changing its status to “Publish.”

I can’t preview my page.

Make sure you are clicking on the Preview icon in the smart form and not in the content page.
The spacing on my page is all messed up.

The CMS editor is not a what-you-see-is-what-you-get environment. Sometimes it looks like there isn’t a space when there is one, and vice versa.

Before trying to fix the spacing, first check your content in. The spacing that appears in the ‘check in’ view is the actual spacing that will appear online.

If the spacing in the check in view is not what you are hoping for, here are a few tricks for fixing it:

• If there are too many spaces between lines, highlight all of the empty space between the two pieces of text you are working with by holding down the shift key and using the arrows to highlight the empty space. Hit delete. Your two pieces of text should now be joined. Use “Enter” to create a double space between the two pieces of text or “Shift + Enter” to create a single space.

• If there is not enough space between lines, put your cursor at the end of the line after which you wish to create space. Use “Enter” to create a double space between the two pieces of text or “Shift + Enter” to create a single space.