

CMSMS – CMS Made Simple

IdeaBank **CMS Client Manual**

Edition 1.0

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CMS Made Simple

CMS Made Simple (CMSMS) is an open source content management system installed by IdeaBank as part of your website package. CMSMS enables you update and manage most parts of your website. We have constructed this manual to assist you with understanding how CMSMS works and how you can use it to keep your website update!

Introduction

Content Management Systems (CMS) have now developed to a point where a website designer or computer programmer is no longer needed to add or edit website content. However, the use of a content management system could not be described as non-technical, as some knowledge and appreciation of how the web works and the CMS works is still needed. Creating a webpage is not as straight-forward as pasting in text and images from a word document.

With this in mind, this manual has been created to assist IdeaBank clients that want to add and edit website content themselves. We suggest you read this document in full as it will give you a good introduction and many important tips you will need to know to effectively manage your website without too much help from IdeaBank. As always though, IdeaBank is ready to help and assist you when and if you need it.

The content management system used by IdeaBank is called CMS made simple (CMSMS). It is an open source software package available from cmsms.org. This CMS was selected by IdeaBank after testing 20 different open source content management systems, as we consider it to be the best when considered overall for ease of use, stability and functionality. Other CMS systems abound, but we have found CMSMS to be the easiest to operate and modify to our client's needs. However, as with any software program, program errors and "bugs" do arise from time to time. Please let us know if you experience any unusual behaviour when using CMSMS so we can attempt to rectify any problems you may have.

CMSMS has a number of modules, which may include on your website news functionality, blogs and image galleries. New modules are coming available all the time, so please let us know if you would like us to investigate the introduction of new functionality to your CMSMS installation.

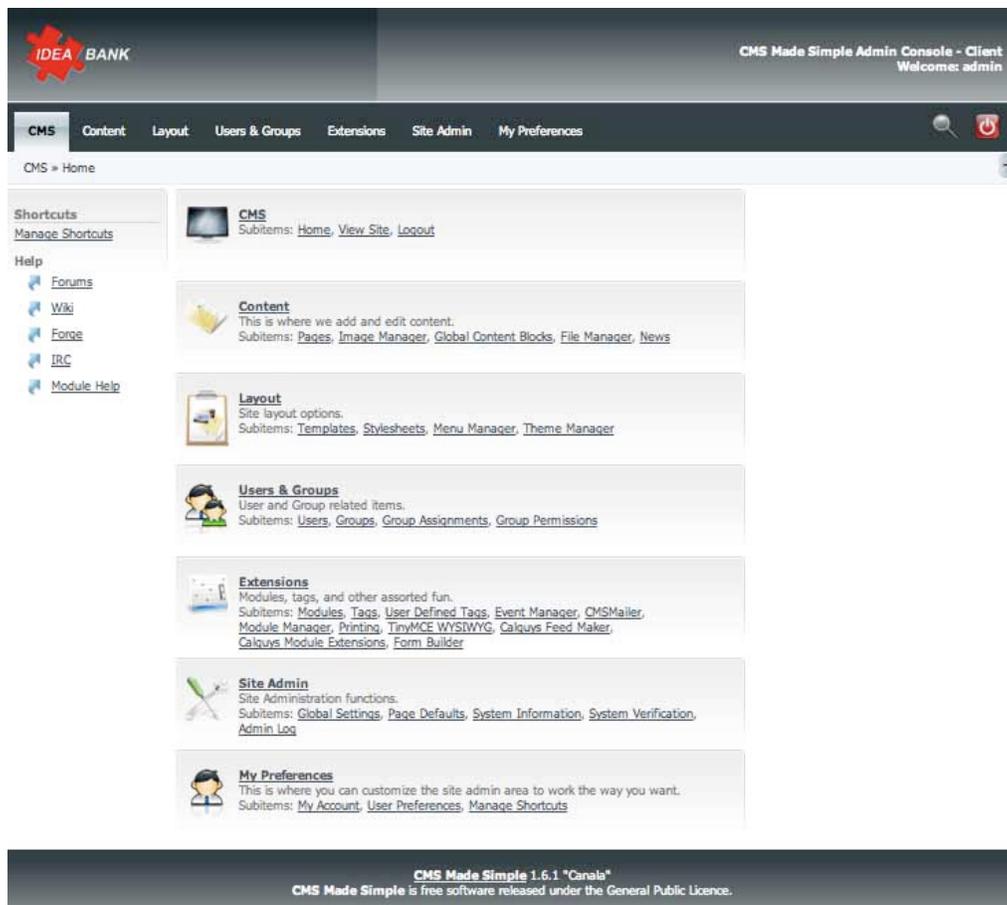
Logging into CMSMS

To login to the CMSMS Editing Area, go to your website home-page. At the bottom of the page in the footer, click on the login link. At the login page, enter your username and password (provided to you by IdeaBank).

TIP: Ensure that you keep your login details secure as anyone with these details and an Internet connection could modify your website remotely. If you use a computer that is not your own we recommend you use Mozilla Firefox, and ensure that you clear all private data (passwords, cookies, cache, history) when exiting the browser.

Using CMSMS Admin Area

Once logged in to CMSMS you will be shown the following screen.



CMS Options

Depending on your granted access privileges, you will be provided with some of the following menu options (in the horizontal drop-down menu).

CMS

CMS >> Home	Shows a list of all your available options in the admin area.
CMS >> Logout	Logout of CMSMS Admin Area.

Content

Content >> Pages	View all pages (for editing).
Content >> Image Manager	Upload and manage images
Content >> Global Content Blocks	add content that can be used from more than one page (eg edit the common content that areas in your web-page footer).
Content >> File Manager	upload files to the website (PDFs, zip files).
Content >> News	Add and Manage News Articles.

Layout

Please rely on IdeaBank to manage your layout, menu, templates and stylesheets, as specialist skills are required.

Users & Groups

Users & Groups >> Users	Create and manage user access to the CMSMS editing area.
Users & Groups >> Groups	Create groups to assign users to.
Users & Groups >> Group Assignments	Assign users to groups.
Users & Groups >> Group Permissions	Set the permissions and access of all groups.

Extensions

Please rely on IdeaBank to manage your extensions as specialist skills are required.

Site Admin

Please rely on IdeaBank to manage your Site Admin as specialist skills are required.

My Preferences

My Preferences >> My Account	Manage your account settings (password, username, email address).
My Preferences >> User Preferences	Manage how CMSMS.
My Preferences >> Manage Shortcuts	Not used.

These buttons do the following:



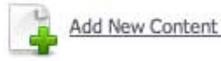
The magnifying glass launches the website in a new window.

The Red power button logs you out of the CMSMS editing area.

Relevant options for your use are described in the following sections.

Content >> Pages

From the Content Menu, Click on Pages. A list of all website pages are displayed. There are several options on this page, which we now described.



[Add New Content](#)

The Add New Content Button - enables you to add a new web-page.



[Reorder Pages](#)

The Reorder Pages Button - enables you to reorder pages. This function is described in a following section.



[Expand All Sections](#)

Expand All sections - As described in the following section, Understanding How Pages are ordered, pages are assigned a parent page. Expand all section shows all children of parent pages

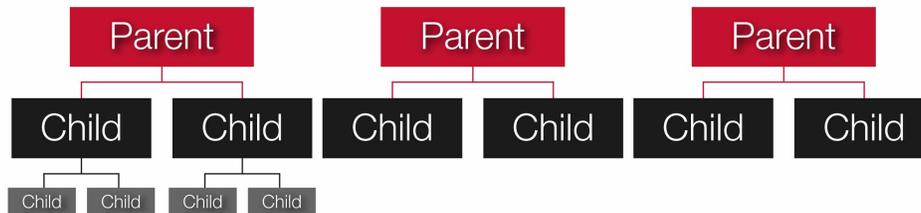


[Collapse All Sections](#)

Collapse All sections - As described in the following section, Understanding How Pages are ordered, pages are assigned a parent page. Expand all section hides all children of parent pages.

Understanding How Web-Pages are Ordered

A website consists of webpages connected by hyperlinks. In CMSMS, web-pages are assigned a parent page, in that they become a child page of the parent, as shown in the diagram below.



The top level in the menu are the parent pages. Each parent page can have children pages, which in turn can be parents to other children.

The levels in the tree are assigned numbers, for example:

- 1 Parent (the root, with a depth of 1)
- 1.1 Child (depth of 2)
- 1.1.1 Child of the Child (depth of 3)

As shown above, the depth of a web-page in the hierarchy can also be considered.

A menu system has been setup on your website, which helps users to navigate between web-pages. This numbering system determines where in the menu a given page appears. A horizontal menu on the website will show all pages at a given depth. eg 1.1, 1.2, 1.3, 2.1, 2.2, etc.

A more complex menu, such as a drop-down menu, will typically show all pages on a website of depth 2 and greater, with the top entries being depth 2, and children of higher depth shown in the drop-down sub-menus.

The position of a page in a website can be adjusted by two settings:

1. Selection of the parent of the page. The parent can be selected when editing a page.
2. Order of the page amongst others with the same parent. The order of children can be changed using Reorder Pages, described on a following page.

In all IdeaBank websites, the top level page (the root) is called by the name of the website domain, and is used only as a place-holder (e.g. it is not used on the public website and does not contain in web-page content). This page is assigned the number 1. Page 1.1 Home is assigned as the Default Page. This is the page that appears when the address of your website is entered into a browser (without reference to a particular page).

The screenshot shows the CMS Made Simple Admin Console interface. At the top, there is a navigation bar with the 'Content' menu selected. Below this, there is a 'Current Pages' section with a table of pages. The table has columns for Page, Template, Type, Owner, Active, Default, and Move. Below the table are several action buttons: 'Add New Content', 'Expand All Sections', 'Collapse All Sections', 'Reorder Pages', and a 'With Selected:' dropdown menu with 'Delete' and 'Submit' options. At the bottom, there is a footer with the text 'CMS Made Simple 1.6.1 "Canala" CMS Made Simple is free software released under the General Public Licence.'

Page	Template	Type	Owner	Active	Default	Move	
1 Home	wfs1	Content	admin	✓	✓	▼	🔍 📄 🗑️ 🔄
1.1 - Welcome	wfs1	Content	admin	✓	✗	▼	🔍 📄 🗑️ 🔄
1.2 - About Us	wfs1	Content	admin	✓	✗	▲▼	🔍 📄 🗑️ 🔄
1.2.1 - - Our Staff	wfs1	Content	admin	✓	✗	▲▼	🔍 📄 🗑️ 🔄
1.3 - Contact Us	wfs1	Content	admin	✓	✗	▲▼	🔍 📄 🗑️ 🔄
1.4 - Terms of Use	wfs1	Content	admin	✓	✗	▲▼	🔍 📄 🗑️ 🔄
1.5 - Privacy	wfs1	Content	admin	✓	✗	▲▼	🔍 📄 🗑️ 🔄

As shown above, each page is listed. Various actions can be performed on each page from this page. To edit a page, click on the page name. This will take you to Edit Content section for the given page.

Template

All pages are assigned a template. The template has been created for you by IdeaBank and determines how the given page displays on the webpage (e.g.: the number of columns, the graphics used). In some cases, a number of different templates will have been created for you with different properties. The selected page template may be selected for a given page in the Edit Page section under the options tab (described later in this document).

Type

Pages may be assigned a variety of types. The type of a given page may be selected in the edit content page section under the Main tab. Types are described in more detail in a later section.

Owner

The owner is the original creator of the page. Only the owner may change the permission of pages (who is permitted to edit the page).

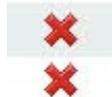
Active

Do not use this function! If a tick is shown the page is visible and accessible from the public Internet. Set to inactive (a cross) to hide the page. When a page is inactive the page is only accessible from within the admin area. We do not recommend the use of Active. The reason why is described in detail on page XXX.

Default



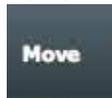
Sets this page as the default web-page that appears when a user types in your website address. In effect, the selected default page is the home-page of your website. Only one page can be set as the default web-page.



To select a page to be the default page, click in the Default column for that page. You will then have to click OK in the popup dialog.

The default page is the page with the icon  in the Default column. All other pages have the icon .

Move



Click on the up-down arrows to move a page up or down in the page hierarchy. Reorder Pages can also be used for this function. Note that a page cannot change its parent using this function, limiting the move function to reordering of the page amongst its siblings only. To change the parent of the page, edit content for the given page and change the parent on the Main Tab.

View



Opens a new window showing this page.

Copy



Make a copy of this page, so that this page may be used as a starting point for a new page.

Edit



Edit this page. A page can also be selected for editing by clicking on the Page name.

Delete



Delete this page. In the popup dialog, click OK and the page is permanently deleted.

Note:

You cannot delete a page that has children pages. Then you first need to delete all the children pages, or make them have another parent page. Also, you cannot delete the page that is the default page, until you choose another page to be the default page.

Note:

You can Delete/Inactivate/Activate multiple pages in one time. Select the pages and select the appropriate action from the "With Selected" dropdown list. For details see section "Bulk Actions" below.

Bulk Actions

Each page has a checkbox at the end of the options. Actions can be performed on multiple pages by selecting them by checking the checkbox.

Actions may be selected and performed using the dropdown box and submit button at the bottom right of this page.

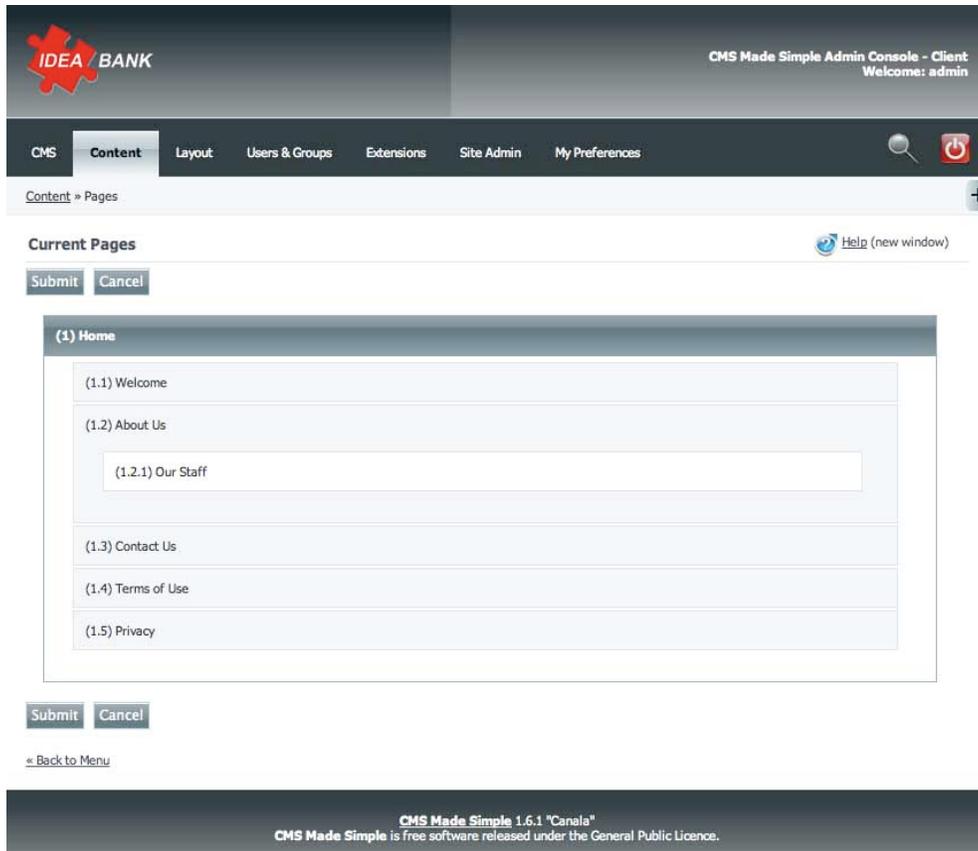
Actions include:

	Delete	deletes all selected pages.
	Active	selected pages are visible on the website / Internet.
	Inactive	selected pages will only be available for viewing from the admin area.
	Cachable	selected pages will be cached (for faster access, but updates to pages may not be immediately shown).
	Non cachable	selected pages will not be cached
	Show In Menu	selected pages will be set to visible in the website menus.
	Hide In Menu	selected pages will no longer be visible in the website menus.
	Set Template	changes the page template of the selected pages

To commit to changes of the selected pages click on the Submit button.

Reorder Pages

The Reorder page enables you to reorder pages using your mouse only, by clicking on a page and dragging it to its new location in the page hierarchy. The order corresponds to appearance in any menu system on your website.

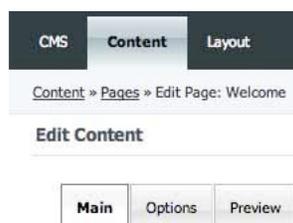


Note:

Pages can only be reordered amongst children of their parent only. The parent of a given page cannot be altered from reorder pages (to select a different parent for a page, go to the edit content section for the given page).

Add New Content / Edit New Content

When adding new content / editing an existing page the same page format is given, which is now described.



When clicking on a page from the pages list, you are presented with 3 tabs:

- Main
- Options
- Preview

We now describe the **main** tab in more detail.

Submit Button

Submit the changes and return to "Content/Pages".

Apply Button

The Apply button will only appear when you update the contents, not when you "Add New Content". To apply the changes you made, but still stay in the editing window press this button.

Cancel Button

To return to "Content/Pages" without applying any of the changes you have made.

Preview Button

To preview the page without saving or leaving the editing window. It opens a new browser window or tab. See section "Preview Tab" below for an alternative.

Content Type

The type of web-page. This is described in detail in a section on the following page. By default the type will be Content.

Title

The title of this web-page.

Menu Text

Next select the text that will appear in the menu. The menu text can either be the same as or different from the title.

Parent

If the page you are adding is to be a child to another page, then you select the parent page among the existing pages.

Template

Select the page template. If in doubt, use the default. Page templates are described in more detail in a later section.

Content

Add the actual content of the page using the editor. Detailed instructions on use of the editor is given in the following section.

Page Types / Content Type

Pages may be classified as:

Content

The content type is simply a regular page. That is what this page you are reading is. Here you can put any content that you would put on a regular page. The layout of these types of pages are controlled by the templates. For each content page you create you must choose a template for it. If you login as admin and change the template of this page, you will see exactly how it works.

External Link

The External link type is just what it sounds like, a link to another external page. This External Link type also shows up in the menu following the same hierarchy rules as the content type.

Internal page Link

The Internal Page link type is just what it sounds like, a link to another Internal Page. This Internal Page Link type also shows up in the menu following the same hierarchy rules as the content type.

Section Header

The section header type is used to break up menus into groupings. This is unrelated to the hierarchy, as the section headers have no associated pages with them. They are just a little bit of text to say what the next few links are in reference to.

Separator

The separator type is just what it sounds like, a separator that appears on the menus. This type follows the hierarchy set in content management pages.

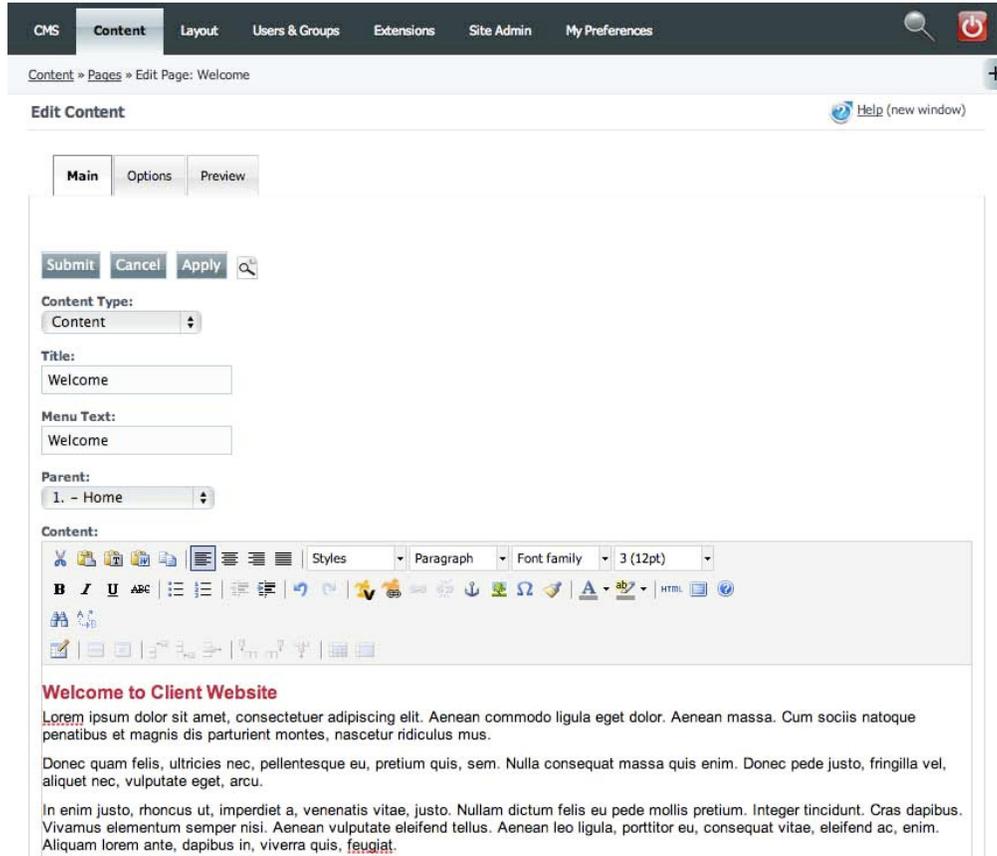
INTERMEDIATE TIP: To edit multiple pages at one time, or copy content from one page to another, from the list of pages, right click on the page name and click on "open in new window". You can follow this process to open multiple pages in different windows, such that you can edit the different pages by using cut/copy and paste functions.

ADVANCED TIP: Do the same as above, but copy HTML content between pages by clicking on the edit HTML source button.

TIP: Make the title as descriptive as possible. An ideal length is about 100 characters. The title should describe the content of the webpage using keywords you want the search engines to index you for.

Using the Editor to Add / Edit Content

A screen shot of the editor is shown below. You may have several editors in your edit content window, as there may be multiple content areas for the given page, depending on the selected template (for example, if this webpage has two columns, there may be an editor window for each column).



Your website has already been designed with a particular font, font-size, font-colour and font-style. It is best to simply enter text without modifying the style. To see what the webpage will actually look like, click on the preview tab.

If you paste in text from another document (such as word), be sure to use the paste as plain text button (not the paste button), otherwise the font-formatting from the original document is included. This formatting will override the default formatting of the webpage. Alternatively, paste your text into text editor (e.g. notepad) first, then copy the text and then paste into the webpage editor. This process will remove any formatting

Pasting in Text Content

WORD -> CMS USING PASTE AS PLAIN TEXT - CORRECT

WORD -> CONTENT MANAGEMENT SYSTEM – INCORRECT

WORD -> NOTEPAD -> CONTENT MANAGEMENT SYSTEM – CORRECT

TIP: When you enter text, typically it will automatically be defined as Paragraph. To change text to a heading, select the text and then select H1.

TIP: If entered text appears unformatted, click on the text with your cursor, and then check if the text has a format of H1 or Paragraph. If it does not, set the format to H1 or Paragraph depending on your needs.

Pasting in Images

It is not possible to paste in images directly to the CMS. You need to upload the image to the website first using the file or image manager. Then you can add the image using the image button in the editor. A webpage and web browser does not operate in the same way as a word document so this functionality simply isn't possible in any CMS.

The Editor Icons Explained

It is not possible to paste in images directly to the CMS. You need to upload the image to the website first using the file or image manager. Then you can add the image using the image button in the editor. A webpage and web browser does not operate in the same way as a word document so this functionality simply isn't possible in any CMS.



CUT

cut content.



PASTE

paste content (use with caution, see tips above).



PASTE AS PLAIN TEXT

Pastes in text content without any formatting. For example, use this option to paste in content from a word document as unformatted text.



COPY

copy content.



ALIGN-LEFT

left justify content.



ALIGN-CENTER

centre justify content.



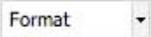
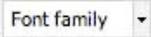
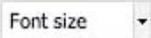
ALIGN-RIGHT

right justify content.



ALIGN-FULL

full-justify content (left and right justify combined, text is stretched). We recommend you use ALIGN-FULL for most website text content.

	STYLE	DO NOT USE
	FORMAT	Only the following format options have been defined. On your website. Do not use other options for your content: <ul style="list-style-type: none"> • Paragraph - use for all text • H1 - use for all headings
	FONT-FAMILY	do not use unless you want to override the default font of the website (not recommended for consistency).
	FONT-SIZE	do not use unless you want to override the default font-sizes of the website. If you do override, check the changes in the preview menu
	BOLD	
	ITALIC	
	UNDERLINE	
	STRIKE-THROUGH	
	UNNUMBERED BULLET POINTS	
	NUMBERED BULLET POINTS	
	INDENT LEFT	
	INDENT RIGHT	
	UNDO	(In Windows you can also use control-Z)
	REDO	(In Windows you can also use control-Y)
	INSERT CMSMS LINK	Use this to insert a link to an internal webpage (a webpage already on this website and is part of the CMSMS).
	INSERT / EDIT LINK	Use insert/edit link to link to an external webpage or website or to a document uploaded to the website using the file-manager.

TIP: if you have made extensive changes to a page that you decide you now do not want to change, click on the cancel button to discard all changes and return to the content->page webpage.

Select (highlight) the text or image that is to be linked.

If you do not highlight the text or image, the Insert / Edit Link button is ghosted and cannot be clicked.

Click on the insert/edit link button.

A dialog will be displayed with four tabs, general, popup, events, advanced.

TIP: highlight the text to be linked (use mouse with left button and drag across the text), then click on the CMSMS button. After pressing the button, a list of webpages will be displayed. Select one. Click insert. A tag-link will be inserted in the text.

Link URL

Enter the web-page or document to link to. If linking to a document or file, click on the browse button and select the file. Otherwise simply enter the URL / web address of the external link.

TIP: links to documents or other websites should be opened in a new window so that the user can return to the current webpage after reviewing the document without pressing the back button.

Anchors

Do not change

Target

Indicate whether the document or webpage should open in the same browser window, or open a new browser window.

It is not necessary to use the other tabs.



UNLNK	use to break a link.
INSERT / EDIT ANCHOR	do not use.
INSERT / EDIT IMAGE	insert an image in the document.

How to insert an image

Click on image button.

Three tabs are displayed general, appearance and advanced.

Click on image URL to find your image (you must have uploaded an image using the file manager first).

Image description

Good to give image a description for accessibility and search engine optimisation

Title

Not needed.

TIP: alignment is very important for your images. Do you want the text to flow around the image or allow the image to be displayed on its own in between paragraphs.

TIP: once an image has been inserted, you can link the image to another webpage or another image (just like a text link). Click on the image, and select the insert/edit link button (see instructions above for insert/edit link).

Alignment

Set the alignment of the image

Dimensions

No not use. Ensure your image is the correct dimensions before uploading it.

Vertical space

Do not use, space is automatically inserted by the webpage template

Horizontal space

Do not use, space is automatically inserted by the webpage template

Border

Do not use

Class

Do not use

Style

Do not use

Advanced tab

Do not use

	INSERT CUSTOM CHARACTER	use to insert common characters that do not appear on the keyboard, such as the copyright symbol.
	CLEANUP MESSY CODE	do not use.
	SELECT TEXT COLOR	we recommend you do not use as the default colours of the website will be overridden.
	SELECT BACKGROUND COLOR	we recommend you do not use as the default colours of the website will be overridden and this is also considered to be an outdated design technique.
	HTML	can be used to edit the HTML of the webpage. For advanced users only.
	TOGGLE FULL-SCREEN MODE	toogles a full screen editing mode, click again to leave full-screen editing mode.
	HELP	not useful.

Tables are described in the following section.

Creating and Working with Tables

Table support in CMSMS works but is still somewhat error prone. If you run into problems with tables please contact IdeaBank and we can assist. When creating a table, be sure to specify the width of the table in the table properties, so the table does not run off the page or overlap left or right text areas. Normally a table should be no more than 700 pixels wide (depends on the page and the number of columns).

To edit a table, right click on the table to access the table properties or use the icons on the editor.

If you are familiar with HTML, if you experience table formatting problems use the Edit HTML source and edit the table HTML code directly.

After implementing a table ensure that you check your webpage in a variety of web-browsers, and also adjust the size of your browser to the smallest you believe a visitor would be using (e.g. 1024 pixels wide) to test compatability.

Working With Text Content from other sources

The CMSMS effectively hides from the user that the underlying structure is a set of complex rules and interactions between HTML, CSS stylesheets and the given browser. In some cases, content will not change colour, font or justification. In these cases, the page content has been given conflicting properties and does not know how to respond to the given command. To overcome these difficulties, if you are familiar with HTML, click on the HTML box and edit the HTML directly. Alternatively, copy the text out of the text window and paste it into a text editor (like notepad). This will strip any HTML

codes from the text. Copy the text from the text editor and paste it back into the CMSMS. This will effectively remove any formatting. You are now free once again to format the text as you require.

Working with Images

Images in HTML do not have the same degree of flexibility in placement as seen in word processing packages. Images can essentially be placed to the left middle or centre of text. In HTML, a vertical and horizontal padding can be placed around images. The look and feel of the page is further complicated by the ability of browsers to resize the text to the requirements of the user, changing the look and feel of a page as text scrolls past the images. Often the best approach is to place an image on the top right of a content block.

If a number of images need to be placed exactly, we recommend you add a table, and insert an image in the right-column of the table, and the text in the left. The same approach can be taken when needing to display multiple images next to each other down a page. Tables were not intended for this approach but it is often the easier way to present images and text in a clean format.

When uploading images, consider that size, resolution and image quality of the image may effect the download time. It is best to use an image editing program on the image before upload to reduce the size of the image to the minimum required size, and also reduce the image quality to the lowest that is required. Reducing the image quality (for a JPEG, this is referred to as the JPEG image quality) often has a very significant impact on decreasing the required storage space for the image. In order to see the difference, compare the original and new file KB size prior to upload.

Text Formatting Guidelines

In most cases we highly recommend the use of full justification on text to ensure a quality look across the website. Also, it is recommended not to alter the colour of text, as the stylesheet of the web-page has been set to automatically and uniformly colour text according to H1, H2 and paragraph selected colours. There is no particular need to set the text colour, as it is automatically coloured prior to display in the browser.

Adding Images to your Web-pages

Often you require a thumbnail of an image that opens to the standard size image in a new window.

To do this, create a small version of the image using any standard image editing program. When saving add the word thumb to the image filename.

Then upload the standard and thumbnail version of the image to the website using the file-manager.

Then edit your page, insert the thumbnail image. Click on the thumbnail image and select insert/edit link. Select the standard image and setting to open in a new window.

To Learn more about how to handle and work with images on the web, please read the section in this manual entitled:

Image Quality, Image Resolution and Image File-size

Options Tab

Template

Each web-page is assigned a template. The template indicates the structure of the page and where your text and image content stored in the CMSMS is inserted. Your templates have been created for you by IdeaBank. In most cases, when adding a new page, the default template will be most suitable. More information is given on

TIP: The page alias should be descriptive, using words separated by - to make the file name search engine readable. Use keywords in the page alias that you want the search engines to find you for, e.g. these-are-my-keywords.)

Show in Menu

This web-page is not shown in any menu in the public website.

Active

If checked this page is available on the public website. We do not recommend the use of Active, please see detailed information on this item later in this document.

Cachable

If you enable caching, the underlying template engine will keep a copy of your page on the server, so that it can render the page more quickly. If you disable caching, each request will cause the page to be assembled from its constituent parts (template, content, etc). In some specific cases caching needs to be disabled, but in almost all cases using caching is acceptable.

This page is searchable

If search is installed, this checkbox makes a page searchable for the Search Module or not. Uncheck it and the search module will ignore this page.

Target

The type of window the web-page is opened in on the public website. This is one of

none	Open the page in the same window/tab (default).
_blank	Open the page in a new window/tab
_self	as 'none'
_parent	Open in the parent frame above the current

frame (framesets only)
_top Open in the very top of nested frames (framesets only). If you do not have nested frames _parent and _top act the same.

Page Alias

This is used to generate the URL for the page (the filename of the web-page as displayed in the browser address bar). DO NOT include a .htm or .html filename extension at the end of the page alias as this is automatically added by CMSMS.

Page Specific Metadata

Metadata is used by the search engines to index your webpage. How to edit metadata is described in more detail in a section just below.

Smarty data or logic that is specific to this page

Not used.

Thumbnail

Not used.

Access Key

Not used.

Description

(title attribute)

Not used.

Disable WYSIWYG editor on this page

(Regardless of template or user settings)

Do not use.

Extra Page Attribute 1

Do not use.

Extra Page Attribute 2

Do not use.

Extra Page Attribute 3

Do not use.

Owner

Set the owner of this page. Only the owner can edit permissions on this page.

Additional Editors

Set editors that are allowed to modify this page. To select multiple editors, hold down on the shift button and click on each editor to enable. Enabled editors are highlighted.

Last Modified at

Gives the date of last modification.

Last modified by

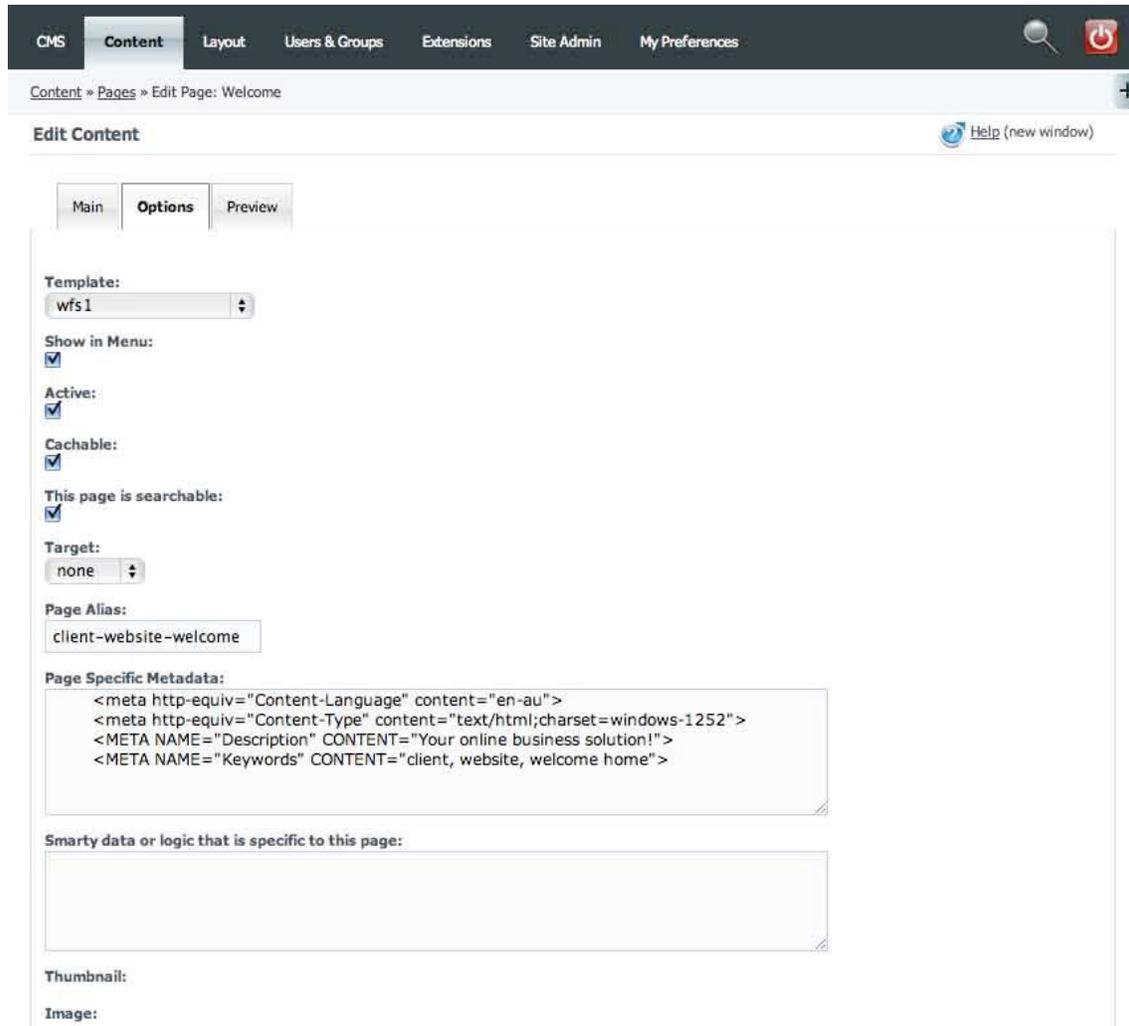
Uses the username of the user that last modified this page.

Page Specific Metadata Explained

It can be very important for search engine optimisation, and getting ranking in the search engines for keywords of your choice. If search engine ranking is important to you for this page, it is highly recommend you enter appropriate metadata in this section.

Default metadata is already inserted in this section. It is up to you to edit this metadata with keywords and descriptions appropriate to your page content.

An example from one of our client websites is shown below.



The screenshot shows the 'Edit Content' interface of a CMS. The top navigation bar includes 'CMS', 'Content', 'Layout', 'Users & Groups', 'Extensions', 'Site Admin', and 'My Preferences'. The breadcrumb trail is 'Content » Pages » Edit Page: Welcome'. The main content area is titled 'Edit Content' and has a 'Help (new window)' link. Below the title are three tabs: 'Main', 'Options', and 'Preview'. The 'Options' tab is active, showing the following settings:

- Template: wfs 1
- Show in Menu:
- Active:
- Cachable:
- This page is searchable:
- Target: none
- Page Alias: client-website-welcome

The 'Page Specific Metadata' section contains the following code:

```
<meta http-equiv="Content-Language" content="en-au">
<meta http-equiv="Content-Type" content="text/html; charset=windows-1252">
<META NAME="Description" CONTENT="Your online business solution!">
<META NAME="Keywords" CONTENT="client, website, welcome home">
```

Below this is a section for 'Smarty data or logic that is specific to this page:' which is currently empty. At the bottom, there are fields for 'Thumbnail:' and 'Image:'.

Access Key:

Description (title attribute):

Disable WYSIWYG editor on this page (regardless of template or user settings):

Extra Page Attribute 1:

Extra Page Attribute 2:

Extra Page Attribute 3:

Owner:

Additional Editors

Last modified at:
01/29/2010 04:34:35 PM

Last modified by:
admin

[← Back to Menu](#)

Only edit the content between CONTENT=" "

The different metatags are now described.

DESCRIPTION

A description of the webpage. The description metatag is the most important metatag for search engines. Make the tag as descriptive as possible and follow a sentence like structure. Do not duplicate tags across pages, as search engines rank new content. The most important keywords in the description should appear as close to the beginning as possible. Usually only the first 100 or so words of the description metatag is read by the search engines.

KEYWORDS

similar to description, but is a list of important indexing keywords. The benefit of adding the keyword metatag is now considered of little importance to the search engines (as its use has been heavily abused).

AUTHOR

Leave as is.

COPYRIGHT

Leave as is.

Preview Tab

This Tab shows a preview of your page in a frame without "applying" or "submitting" your changes to the public website. This is useful if you want to check your changes or your new page (as it appears in a real browser) before you publish it. You can switch back to the Main Tab to alter your content if you are not satisfied with the result. In some cases you may need to click the "Preview" tab twice to update the view.

We discuss in the section below alternatives to reviewing your content most effectively.

TIP: Please note that the preview tab, because it appears within a webpage, may not always be exactly what appears on the public website. Please ensure you always check the actual website page after submitting it. Also, do not navigate to other pages through the preview tab as the results you see may be unexpected.

Effective Strategies for Viewing Your Page Changes

We recommend one of the following strategies to effectively edit and review new page content.

1. Make use of the preview tab, taking into consideration the instructions and tips given in the Preview Tab Section above.
2. As an alternative to 1, from the main tab click on the magnifying glass to open the web-page in a new window. After making your changes, click submit. Return to the new window displaying your web-page. Press F5 to refresh this page so your new changes are shown. Repeat this process until you are happy with the outcome.

When using option 2 above, your changes are immediately visible to the public after you have clicked on submit. If this page is non-critical (eg not the homepage), this is usually a valid approach to updating your webpage. If there are problems with the page changes you can quickly edit these changes once again. However, if you do not wish for visitors to view your changes until you are satisfied with them, disable this page from being visible in the menu, by browsing to the options tab, and turning off the display in menu option. Click on submit to complete this change. Don't forget to reactive this page in the menu after your changes are completed.

For Experienced Users Only:

A more technical option is to first use the copy function to copy the page you wish to change. Make the changes to the copy page, and when the changes are complete, manually copy the text from the copy to the original page. An easy way to complete this is to have the edit section of both pages

open in separate windows, to easily copy from one to another. Rather than copying the text, the preferred approach would be to copy the HTML content directly, by clicking on the HTML button in the edit page section and copying the HTML content across to the HTML content section of the original page.

Problems with the Not Visible Function on Web-Pages

From the pages window, you can "Inactivate" or hide a page to visitors of your site, while still keeping the page "in the system" so that you can publish it later. All pages with this symbol (✓) in the Active column are active and thus shown to visitors of your site. To "Inactivate" a page, simply click on ✓ in the Active column for the page that you'd like to "Inactivate" and the symbol will change to ✗ and vice versa.

We highly recommend you do not set web-pages to not visible unless it is absolutely necessary. This is because of two reasons.

If another page links to the non-visible page (e.g. the home-page to the non-visible page), it is possible that the CMSMS will fail when processing the content of the home-page when it encounters the link to unavailable CMSMS page. This is an error that is currently under review by the CMSMS open source community.

Also, after setting a page to non visible from the Pages window by clicking on the tick, it is not possible to set the page as active by clicking on the X. To reset the page as active you must click on the page as if to edit it, click on the options tab and select the checkbox Active. Then click on submit. Check that the page is not active.

If you plan to use this function, ensure that there are no links to the page from other pages, and that the page is set in the options tab to not appear in the menu.

How Page Layout Works - Templates

Each web-page is assigned a template. The template indicates the structure of the page and where your text and image content stored in the CMSMS is inserted. Your templates have been created for you by IdeaBank. In most cases, when adding a new page, the default template will be most suitable. Typically a template will determine where in the page you insert content. For example, a template with two areas to insert content, will permit the insertion of content into two separate boxes in the editing area for the given page.

A template is basically the HTML layout, or the design, of a page. This is the work of the designer. Whatever is in a template is added on every page that is using that template, meaning that the person editing the content doesn't need any web design skills.

In the template there are placeholders for content and navigation areas. When a user is visiting your site the page is automatically generated from the template and the placeholders are filled with the content.

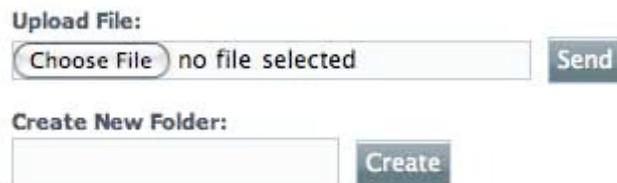
Content >> Image Manager

Images can be uploaded to the website either through the file manager OR the image manager. The image manager provides specific functions for image handling, such as the display of thumbnails in the image manager interface, and the ability to resize, rotate and crop images. However, we highly recommend you edit images yourself on your computer prior to upload using one of the freely available image editing programs. The reason for this is that there is far more flexibility in image editing in a local program on your machine than through a web-based interface.

The initial interface for the image manager shows the files and directories of your /uploads directory. We recommend that you add new images to your images directory.

Adding an Image

To add an image, do like this:



The screenshot displays the user interface for adding an image. It is divided into two main sections. The first section, titled "Upload File:", contains a "Choose File" button on the left, a text input field in the center that currently displays "no file selected", and a "Send" button on the right. The second section, titled "Create New Folder:", contains an empty text input field on the left and a "Create" button on the right.

1. Browse to the folder where you would like the image to be uploaded to.
2. Click the "Browse" button on the line where it says Upload File: below the image browser.
3. Browse to the image file that you would like to upload.
4. Click Send.

Note:

You can also do a "Create New Folder" which make it easier for you to keep pictures together in folders.

Note:

If you have a lot of image to upload, it is probably faster to use the File Manager. With the File Manager you can upload 5 images at a time (you can set the number in the File Manager Settings tab (max 10)). And if you really have a lot of images to upload, use FTP.

Note:

The maximum size of images that can be uploaded is set to 2 Megabytes.

How to provide access to images once uploaded

Once you have uploaded an image, you can now display the image from any page via the edit content section for a given page. i.e., from content->pages menu, select the page you want the image to appear on. Edit this page, and click on image and browse to the file location. This process is described in more detail in the edit/add content section of this document.

Editing an Image through the website

We highly recommend you use an image editing program to edit your images before uploading, rather than using the image manager. However, the image manager does have the following functionality.

Once you have uploaded images you can edit them by clicking on the edit icon  under each image. The image will then be shown in a popup window with a toolbar with six options.

This is what you can do:

Crop

To crop an image, select Crop in the toolbar. Draw a box with your mouse to select what part of the image to keep. The part of the image within the rectangle is what will be kept and the greyed-out area outside it will be removed from the image. You can change the size of the rectangle by dragging the small boxes in the corners and along the sides. You can also move the part of the image to be kept by clicking in the rectangle and drag it.



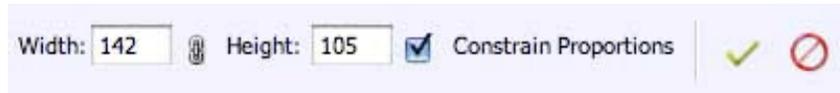
When you have selected what area of the image to keep press the OK button and your image will be cropped. To cancel any changes instead press the Cancel button.

Resize

Resizing an image is good if you'd like to reduce the file size of a large image. To resize an image, select Resize in the toolbar . To make the image smaller or bigger, drag the boxes in the corners or along the sides of the image. By



default proportions are constrained. To resize an image without keeping the proportions untick the Constrain Proportions box.



You can also manually type the pixel width and height in the respective fields at the top.

To confirm the resize click the OK button. Or click Cancel to leave the image unchanged.

Rotate

To rotate an image, click Rotate in the toolbar . If you want to flip the image, select Flip Horizontally or Flip Vertically in the drop-down box Flip Image. You must click the OK button for the changes to take effect.

If you want to rotate the image, select any of the options in the drop-down box Rotate Image. Or you could type any number from 1 to 360 in the field for angle to rotate. You must click the OK button for the changes to take effect.

Measure

You can use the measure tool  to determine the angle and to get information about the distance in pixels between two points of your image.

X and Y show the coordinates of the point where you first click (starting location). W and H show the horizontal and vertical distance respectively between imagined horizontal or vertical lines along the two points. A shows the angle (relative to the axis) and D the total distance in pixels between the two points.

Once you have made a measure you can click on rotate and the angle of the measure is selected in the rotate image field.

Marker

By clicking on the marker tool in the toolbar  you select if the marker lines will be black or white.

Save

Naturally, clicking Save  saves the changes you have made to the image. If you just close the window without clicking Save, the changes you have made

will not be saved. If significant changes have been made to the image, it will save with a different filename.

Image Quality, Image Resolution and Image File-size

When uploading images, consider that size, resolution and image quality of the image may effect the download time quite significantly.

The Image resolution corresponds to:

pixel width x pixel height

When an image is placed on a web-page, it can be set to display at a percentage of its original size. For example, an image may be displayed at 25% of its original size to act as a thumbnail for the actual image when clicking on it). **However, this is not recommended**, as the web-page then contains a large image that is only displayed at a small size, meaning that the time to download the page is longer than it needs to be.

As such, we recommend you resize all images appropriate to the display size using an image editing program on your computer prior to uploading the image to the website.

The image quality of the image should also be considered.

The level of detail in images can be adjusted to reduce the file-size in KB. Many details in images are not visible to the human eye, and can be removed by image editing programs to reduce the size of image files by an order of several magnitudes.

It is best to use an image editing program on the image first before upload to reduce the size of the image to the minimum required size, and also reduce the image quality to the lowest that is required. Reducing the image quality (for a JPEG, this is referred to as a setting called JPEG image quality) often has a very significant impact on decreasing the required storage space for the image. In order to see the difference, compare the original and new file KB size prior to upload.

Please contact IdeaBank for information on an appropriate image editing program for your computer.

Image Formats

The image formats used on the site should be GIF or JPEG. TIFF, PNG or BMP images should not be used. These formats either are either not widely supported or produce very large files.

Ensure that images are not too large in size (KB), as this will reduce the speed of download for your website users.

GIF images are only appropriate for small or drawn images. JPEG images should be used for all natural images (i.e. an image taken by a camera).

Important Information on Handling Images

Often you require a thumbnail of an image that opens to the standard size image in a new window.

To do this, create a small version of the image using any standard image editing program. When saving add the word thumb to the image filename.

Then upload the standard and thumbnail version of the image to the website using the file-manager.

Then edit your page, insert the thumbnail image. Click on the thumbnail image and select insert/edit link. Select the standard image and setting to open in a new window.

Document and Image Names

Document and image names should be descriptive as possible with words separated by -. eg descriptive-file-name.jpg This is important for search engine optimization purposes.

Content >> Global Content Blocks

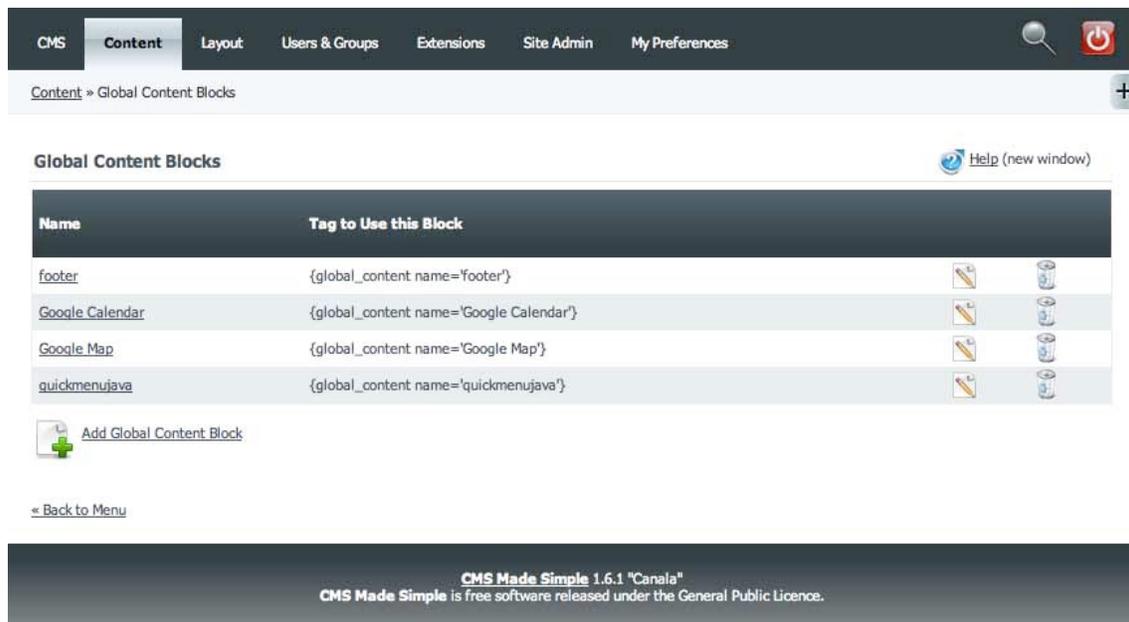
How to edit content that appears on more than one page at a time

Go to the drop-down menu, click on content, then sub-menu item global content blocks.

Global content blocks allow you to place common content on multiple pages of your website.

Global Content Blocks can be edited using a WYSIWYG editor or by directly entering HTML code into the block. At present, your website has been set to enter this content directly as HTML. If you require WYSIWYG editing of global content blocks, please contact us.

To use a global content block, simply copy the Tag to Use This Block line into any page of your website in a content area. For example, in the screen-shot below, to display the global content block latestnews, enter `{global_content name='latestnews'}` into any page of your website.



The screenshot shows the CMS administration interface for Global Content Blocks. The top navigation bar includes 'CMS', 'Content', 'Layout', 'Users & Groups', 'Extensions', 'Site Admin', and 'My Preferences'. The breadcrumb trail is 'Content >> Global Content Blocks'. The main heading is 'Global Content Blocks' with a 'Help (new window)' link. Below this is a table with two columns: 'Name' and 'Tag to Use this Block'. The table lists four blocks: 'footer', 'Google Calendar', 'Google Map', and 'quickmenujava', each with its corresponding HTML tag and edit/delete icons. At the bottom of the table is an 'Add Global Content Block' button. A 'Back to Menu' link is located below the table. A footer banner at the bottom of the page reads: 'CMS Made Simple 1.6.1 "Canala" CMS Made Simple is free software released under the General Public Licence.'

Name	Tag to Use this Block
footer	{global_content name='footer'}
Google Calendar	{global_content name='Google Calendar'}
Google Map	{global_content name='Google Map'}
quickmenujava	{global_content name='quickmenujava'}

In the design of your website, some global content blocks may have already been setup for you. If any are visible, you can click on one and edit it in the same way as edit pages described above. Note - there is no preview option. To view the changes, return to the CONTENT-PAGES and click on the view page option  of any page that contains the global content block reference.

ADVANCED USERS ONLY:

How can I embed javascript in this blocks?

Using tags "{literal}/{literal}" like in a template.

Global content blocks on most IdeaBank sites

In the design of your website, some global content blocks may have been setup for you. If any are present, click on one in global content blocks to edit it in the same way as edit pages described above.

Footer

The footer contains links to the main pages of your website, as well as a link to IdeaBank and your privacy and terms of use statement. The code is presented as HTML, but by following the same structure, it is easy to update and edit the links. If you require assistance please contact IdeaBank.

Google Map

To update your google map, simply browse to your location in googlemaps, and copy the embedded link code provided by google on every map page. Paste this code directly into this global content block over the existing code.

Quickmenujava

Please do not modify any of the global content blocks containing the word menu.

Content >> File Manager

From the Menu select "Content/File Manager".

The File Manager lets you upload and browse files on your website. These files are stored in your /uploads directory. That means that you can browse any files that are found in the uploads folder and its sub-folders.



Browsing the folders is as easy as to click on the folder or the folder names. Clicking on a file name opens that file in a new window.

The FileManger allows you to upload files, rename files, delete files, copy files, move files and create new directories.

You are also able to change permissions on files, but we do not recommend you modify the default file permissions. File permissions only apply to users on the server where your website is stored, they do NOT apply to visitors to your website, who have no ability to change files in anyway.

Note

The maximum size of images that can be uploaded is set to 5 Megabytes. If you require to upload larger files, please request FTP file access or a higher upload limit.

Create New Folder

To add a sub-folder, type a name in the field for "Create new directory:" and click OK. This way you can create as many levels of folders as you like. The new folder becomes a sub-folder to the current folder/directory.



Upload Files

First choose the "Upload Files" tab. To upload a file to the current directory, click Browse, find the file on your computer and click OK. The URL to the file you uploaded will then be uploads/name_of_folder/filename. Default, you can upload five files at a time (see settings).



The file manager is used to upload files to your website for use in linking to from web-pages. Examples may include PDF documents or MP3 audio files. All files are uploaded to the /uploads directory on your website. Images

uploaded using the image manager are also uploaded to the uploads directory.

How to upload files:

- Click on the Upload File Tab.
- Click on browse, and locate the file on your computer.
- After you have located the file, click open.
- Once all files for upload have been selected, click the OK button at the bottom of the screen.

How to provide access to files once uploaded

Once you have uploaded a file, you can now hyperlink to the file from any page via **edit content** for a given page. i.e., from content->pages menu, select the page you want the link to the file to appear on. Edit this page, type in text to represent this file e.g. Download Here, and then highlight this text. Click on the hyperlink button, and browse to the file location. This process is described in more detail in the edit/add content section of this document.

Terminology Tip

Upload	sending a file from your computer to a remote computer
Download	receiving a file from a remote computer to your computer

Using FTP

If you have a large number of files to upload to your uploads area, please request access to an FTP account for your website. From an FTP account, you can drag and drop files from your computer to your website using a freely available FTP program. We recommend Windows users download and install filezilla for use in FTP.

Working With Documents

Try to avoid uploading Microsoft Word or Excel documents to the website, particularly if they are to be for public download. Word documents are not a universal format and can also contain macros, which can be infected with viruses.

TIP: Keep a consistent file structure in the uploads directory of your website. You can create new sub-directories to categorise your files. For example, you may have all PDF files stored in a PDF directory, with files further sorted within the PDF directory into the sub-directories 2009, 2010 and 2011.

TIP: It is important to name your files appropriately. So your content may be easily found in the search engines, we recommend descriptive titles with words separated by hyphens "-". For example: What-our-website-is-about.pdf.

For further search engine benefits, in your filenames use keywords visitors are likely to search for in the search engines.

Ideally use PDF documents and images only. Be sure to check the size of PDF documents, as a PDF document designed for printing often has a dots-per-inch (DPI) setting far in excess of what is required for computer viewing or home-printing. Set the DPI to 72dpi or 144dpi, no higher.

Images in PDFs also significantly increase the size of the PDF. Any PDF on the site should ideally be less than 1 Megabyte in size and in most cases under 200 KB. This ensures a fast download time for users of the website.

Content >> News

If installed, you can add news articles to your site using the News module, available from the Content Menu under News.

There are a large number of options in the news module. However, as IdeaBank has already setup your news functionality for you, the only tab you need to be familiar with is the Articles Tab. If you intend to use the other functionality of the news section, please contact us first to ensure we can support your changes.

We now discuss the articles tab in detail.

Managing News Articles

Articles are listed at the bottom of the page.

To add a new article, click on Add Article



In the article list, the date the article was posted is shown. It is also possible via the settings on the article to have the article automatically posted with start and end dates. The article is automatically removed from the site according to the end date.

Articles are stored in Categories. At this time, all articles are stored in the general category.

A tick under Status indicates that the article is publicly available on the website. Click on the tick to deactivate the article. Click on a cross to activate an article.

Click on the trashcan to delete an article from the site.

To perform bulk actions, select the multiple pages you wish to edit using the corresponding checkbox. At this time the only bulk action is delete selected articles.

Adding an Article / editing an article

Click on Add Article to add an article to the site.

To edit an existing article, click on the corresponding edit icon in the article list, or click directly on the article name.

The interface for adding and editing an article is the same.

We now describe this interface in more detail.

Adding article content follows the same format as adding page content, described in an earlier section.

The option headings are given below:

Author	The author of the article.
Title	The title of the article
Category	The category of the article, unless other categories have been setup this will be General.
Summary	Enter a short summary of the article in this section. Do not make the summary too long, as typically it will appear in a small area to the left or right of page content. Please check the look of your summary in your website after making changes. If no summary is entered, the article content is displayed instead.
Content	The actual content of the article. This content is displayed when the summary article link is clicked on.
Extra	Not used at this time.
Post Date	Enter the date the article is to be posted to the website. The default is immediately.
Status	The article status can be switched between published and draft. Draft articles are not available on the public website. You can write a news article without publishing it. Then select Draft here (and publish it later). To publish a news article, select "Publish" in the dropdown list.
Use Expiration Date	Tick this check box to enter a date when to remove an article from the website. This is useful for events, with the expiration date set to the day after the event.

In the News Interface, all fields with * next to the field label are mandatory. These are the fields you can fill in:

When you have filled the mandatory fields, click Submit. If you selected "Published" as status, then your news article will immediately be published on your page when it also meets the "Start Date/End Date" parameters when the "Use Expiration Date" is checked.

Users & Groups

This section is only relevant if you need to control access to the editing functions of the CMSMS for different people in your organisation. For example, you may wish to give access to a staff member to edit particular pages only.

Note that you are only permitted to change groups you have created or if you have administrator access to CMSMS. If in doubt please contact IdeaBank with your requirements.

The following menu options are available.

Users & Groups >> Users

Create and manage user access to the CMSMS editing area. Functions are provided to edit, delete and activate/deactive users.

Users & Groups >> Groups

In Groups, new groups can be created. There are three default groups, admin, editor and designer. From here it is possible to activate/deactivate complete groups from accessing CMSMS.

- Click on permissions to change the permissions of the group.
- Click on assign users to add users to this group.
- Click on edit to edit the properties of this group.
- Click on the trash icon to delete this group.

Users & Groups >> Group Assignments

This function allows you to switch or add users to particular groups. A given user may be a member of multiple groups, with the provided permissions being the superset of both groups.

Users & Groups >> Group Permissions

Set the permissions and access for each group.

- You will be presented with a long list of "Permissions".
- If you like you can select the name of the group you want to change from the popup list.
- Decide what you want your user to have access to, and (de)select the appropriate box.
- If you DO NOT want your User to modify ALL PAGES, do not click "Modify Any Pages". If you want your User to have access to One or more

specific pages, see the next paragraph. There you'll find how to add the appropriate permission in that case.

- Click submit.
- You'll be back at the Group Permissions page, and will see the message 'Permissions have been updated'.

How to provide a user access to one page

- In the top Menu, select "Content/Pages".
- Choose the page you want to add/remove "Additional Editors" to and click its link.
- When the page opens, you will notice three TABS just below 'Edit Content'. Click the middle one, called "Options".
- At the bottom of this Options page, is a field called Owner, usually this is the username of the person who designed the site, and can also be the owner of the website.
- In the dropdown list you can change the owner of this page, if you wish.
- Just below this Owner's field, is another long skinny field, called 'Additional Editors'
- To add a user as an additional editor make sure you first press the control key and then you press the name of that user. If you don't first press the control key, other editor's will be deselected from the list, which is something you probably don't want. With using the control key you can easily (de-)select multiple users from the list.
- Click the SUBMIT button.
- At the top of the list of Pages you will see, 'The content was successfully updated'.

My Preferences

The my preferences menu provides the following options.

My Preferences >> My Account

Manage your account settings (password, username, email address)

My Preferences >> User Preferences

Manage how CMSMS

My Preferences >> Manage Shortcuts

Not used.

My Preferences >> My Account

This page allows a user to change some of their personal details. Currently the options to change are:

- Name (the username)
- Password (twice)
- First name
- Last name
- Email address

My Preferences >> User Preferences

The options on this page enable a user to change some aspects of how the CMSMS admin area works for them.

Select WYSIWYG to use

Choose a WYSIWYG editor to use from this list, if more than one is installed. If you want to be brave you can choose "none" and edit HTML directly.

Select syntax highlighter to use

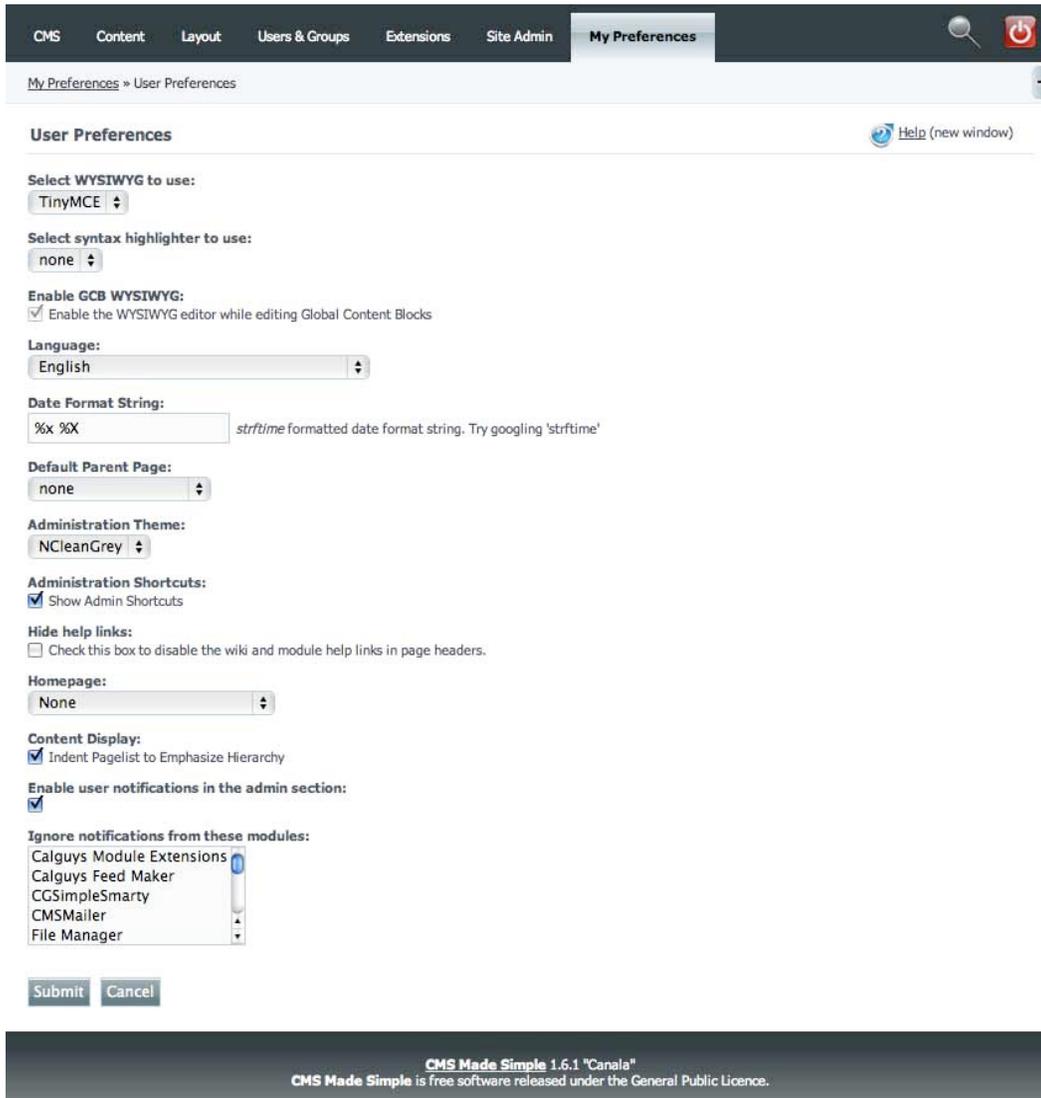
If you have a syntax highlighter installed then you can choose to use it here.

Enable GCB WYSIWYG

When you edit a Global Content Block (GCB) you can choose whether to use the WYSIWYG editor or not.

Language

Choose the language used in the Admin area here.



Date Format String

Choose how dates and times are displayed.

Administration Theme

In the unlikely event that you have more than one admin theme installed, you can choose which to use here.

Administration Shortcuts

Select or deselect if you want to use the Administration Shortcuts.

Hide help links

If you don't want the links to the community wiki to show up on each admin page then just untick this option.

Homepage

Choose which admin page this user will have displayed by default. Very useful if, for example, all your work is done on the News page and you don't wish to click through to there after every login.

Content Display

If you wish to use indentation to emphasise the site content hierarchy, check this option.

My Preferences >> Manage Shortcuts

The Shortcuts menu is a special menu displayed on the main admin page and available as a "pop out" menu throughout the admin area.

It contains user-defined links and is designed to be a quick way to access your commonly-used pages in the admin area.

Add a Shortcut

- Go to the page you want to "bookmark" and copy the URL from your browser's address bar.
- In Manage Shortcuts, add a new Shortcut and paste the URL into the URL field, type a short title for the link in the Title field, and save.
- The shortcut will appear in the Shortcut menu.

Edit a Shortcut

- To edit an existing Shortcut, click the Edit icon for the entry you wish to edit.

Delete a Shortcut

- To delete an existing Shortcut, click the Delete (Trash) icon for the entry you wish to delete.

You can turn the display of the Shortcut menu on or off from the User Preferences page.

Future Versions of this manual to include:

Full explanation of image manager options including thumbnails and editing

Full explanation of file manager options

Additional Information on search engine optimisation using CMSMS

Exact file-size upload details and FTP details

Use of WYSIWYG in GCBs

Blog functionality in CMSMS

Check cross browser compatability

Full explanation of table creation and editing