pTools™

Template Manual - S7

CMS Basic Intro

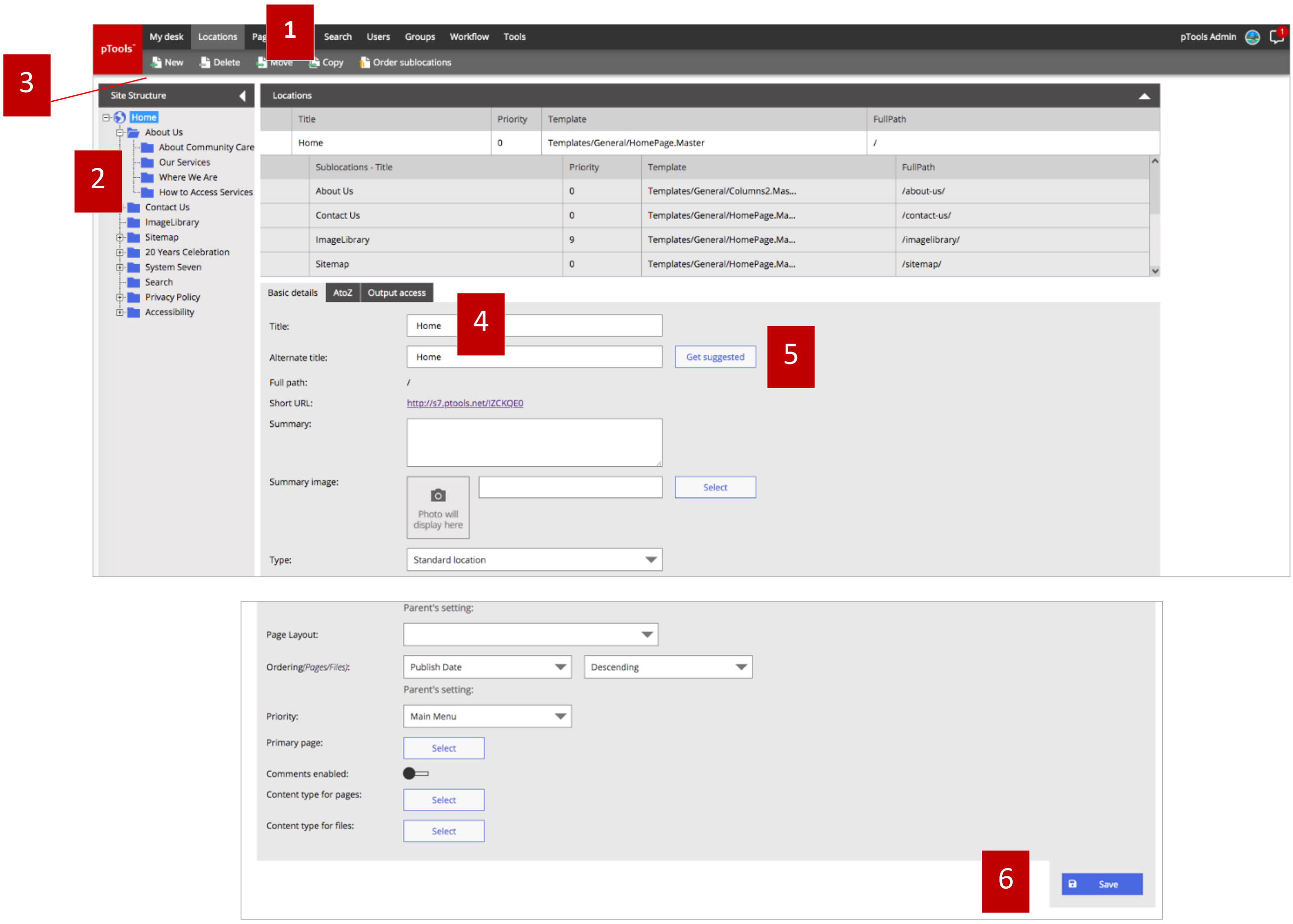
This information is the same as the introduction manual you would have received at the beginning of the project. We've included it here in case you need a refresh of how the CMS is structured. There are also links to some online CMS learning resources.

Locations (Site Structure)

Locations control the navigation on the site (sitemap, sidebar and nav bar, breadcrumbs, landing boxes etc.). To create your sitemap simply create locations and/or sub-locations. Locations are where you assign a template. You can also create hidden locations for folders like an internal media library for example.

The main steps to getting your sitemap and locations in place:

1. Go to Locations (the second tab, next to my desk)
2. Go to Home or a location in the site structure list (this will be the parent)
3. Click New (this will open the Basic Details of the new Location)
4. Give a Location Title (this is what appears in the navigation)
5. Click "Get Suggested" next to alternate title (this will automatically create the end URL so that the full path is defined)
6. Click Submit (the blue button at the bottom, this will publish the location)



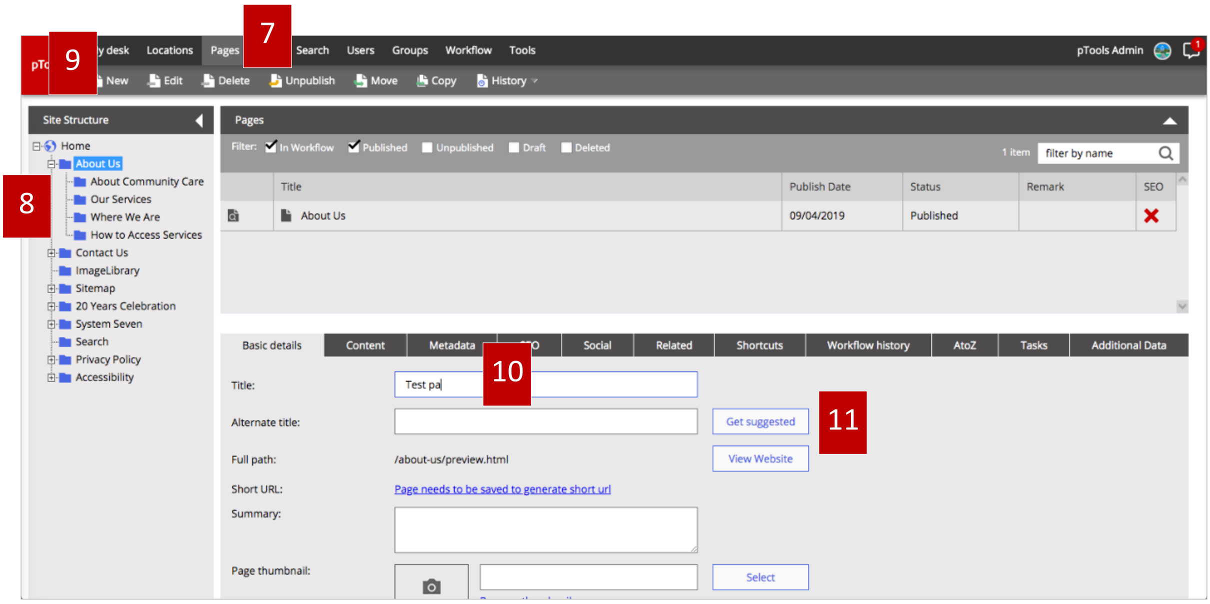
This is how you create the locations and sitemap of your site. To create sublocations or the "next levels" down simply click on the location of your choice and repeat the process, the location highlighted will be the parent of the new location. E.g. to create a "2018 Events" sub location of "Calendar of Events" you should navigate to Locations, then "Calendar of Events" in the list, then click new and repeat the process above until you submit. When you refresh the CMS the new location will appear. Locations can also be moved, deleted and ordered via the buttons next to "New".

Pages

Pages are what hold the actual content (headings, paragraphs, embedded images etc. as seen in the 2-column template). Some templates can cater for multiple pages in a single location like News or Bio templates. Others may not require pages at all like Landing and Homepage templates. You can refer to the template manual (created and sent to you during UAT) to see the selection of templates available for your site.

The main steps to getting your pages in place:

7. Go to Pages (the third tab, next to locations)
8. Go to "Home" (this is the root location)
9. Click New (this will open the Basic Details of the new Location)
10. Give a Location Title (this is what appears in the navigation)
11. Click "Get Suggested" next to alternate title (this will automatically create the end url so that the full path is defined)
12. Click Submit (the blue button at the bottom, this will publish the location)

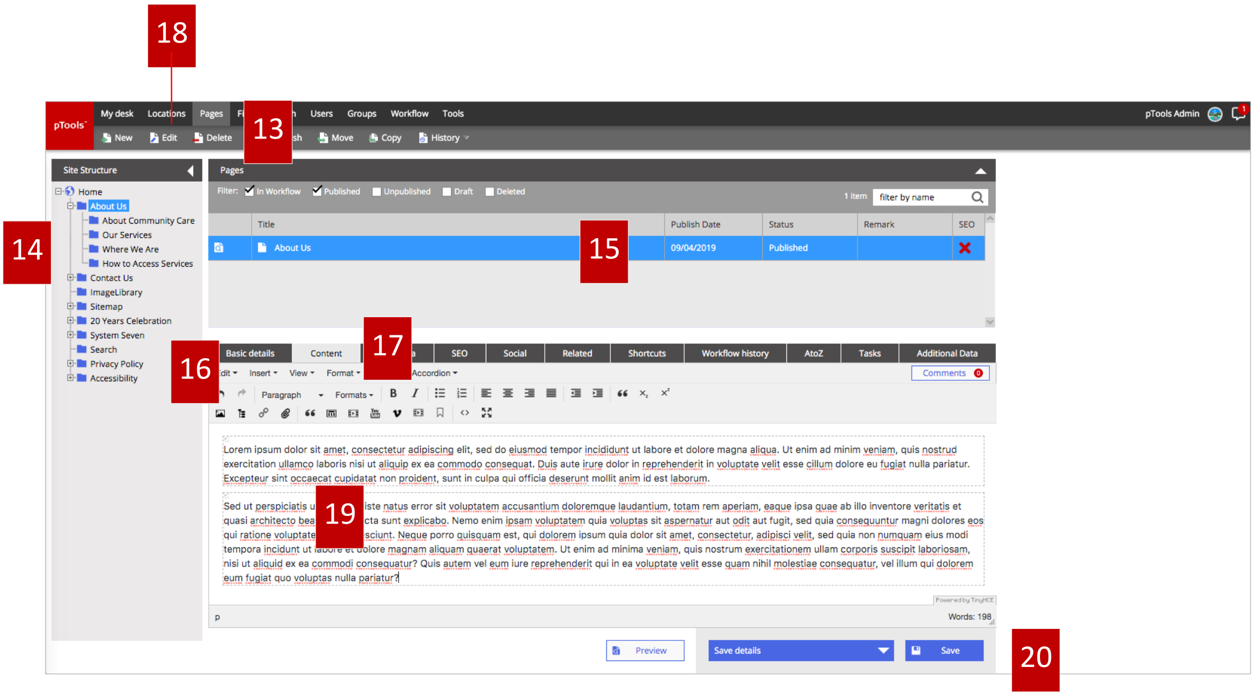


Content

Pages are used to store the content to a site. Images and files can be uploaded to locations and then related or embedded to these pages.

To add content to a page:

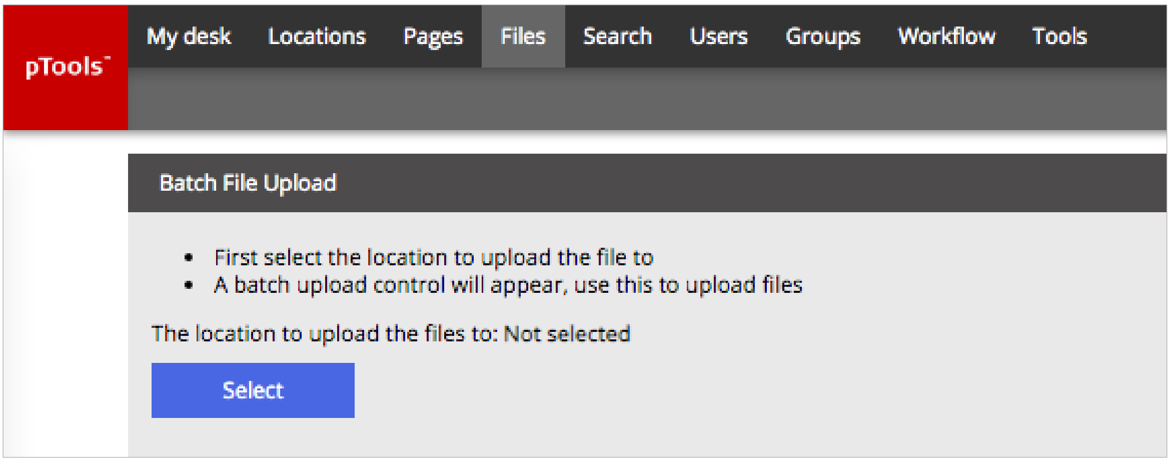
13. Go to Pages
14. Navigate to the location in the site structure list where the page is
15. Find the page in the Pages list.
16. When you click on the page it will open the Basic Details of the Page.
17. Navigate to the Content tab (the next tab to Basic Details).
18. Click the Edit button (Next to New).
19. Input content (the editor will allow various content such as bullet points, embedded videos and images, videos, internal and external links etc.)
20. Click the Save button (the default status is to Publish)

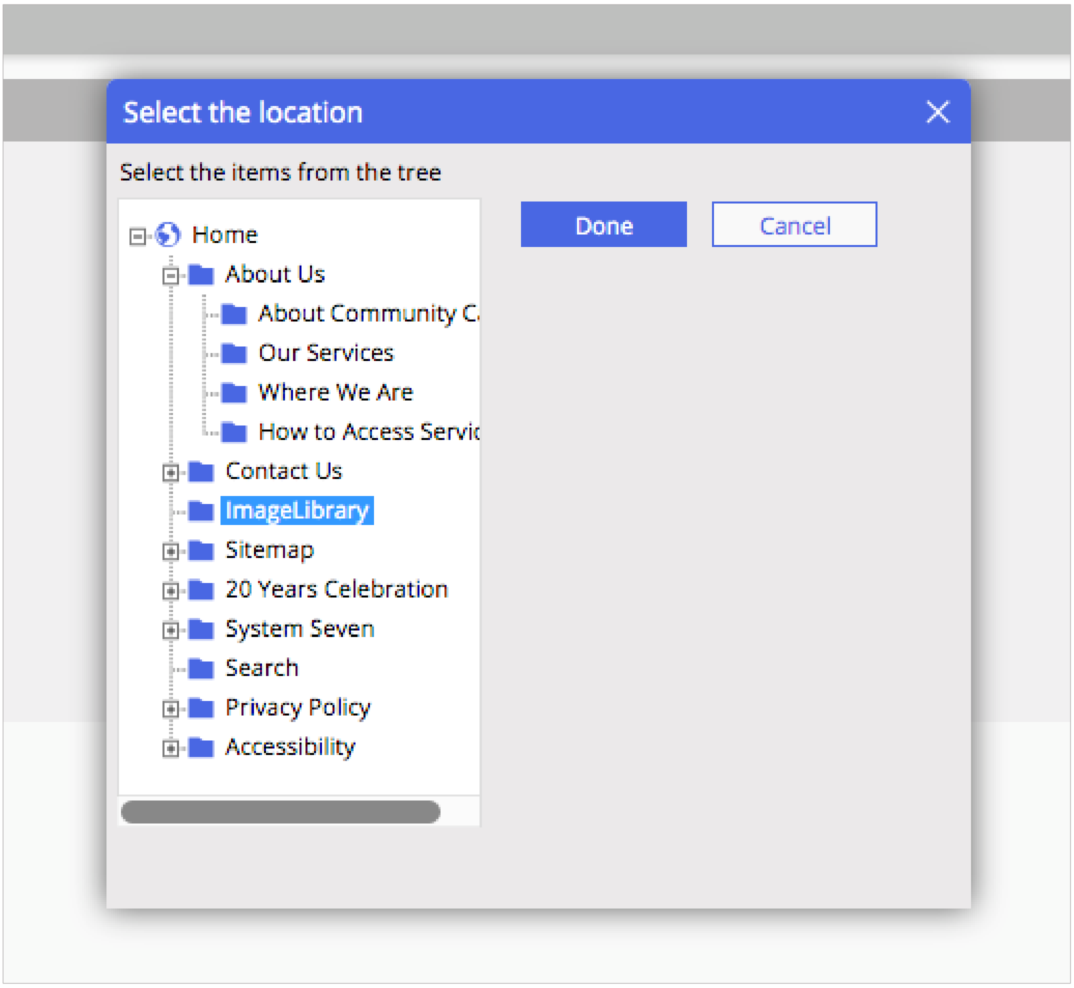


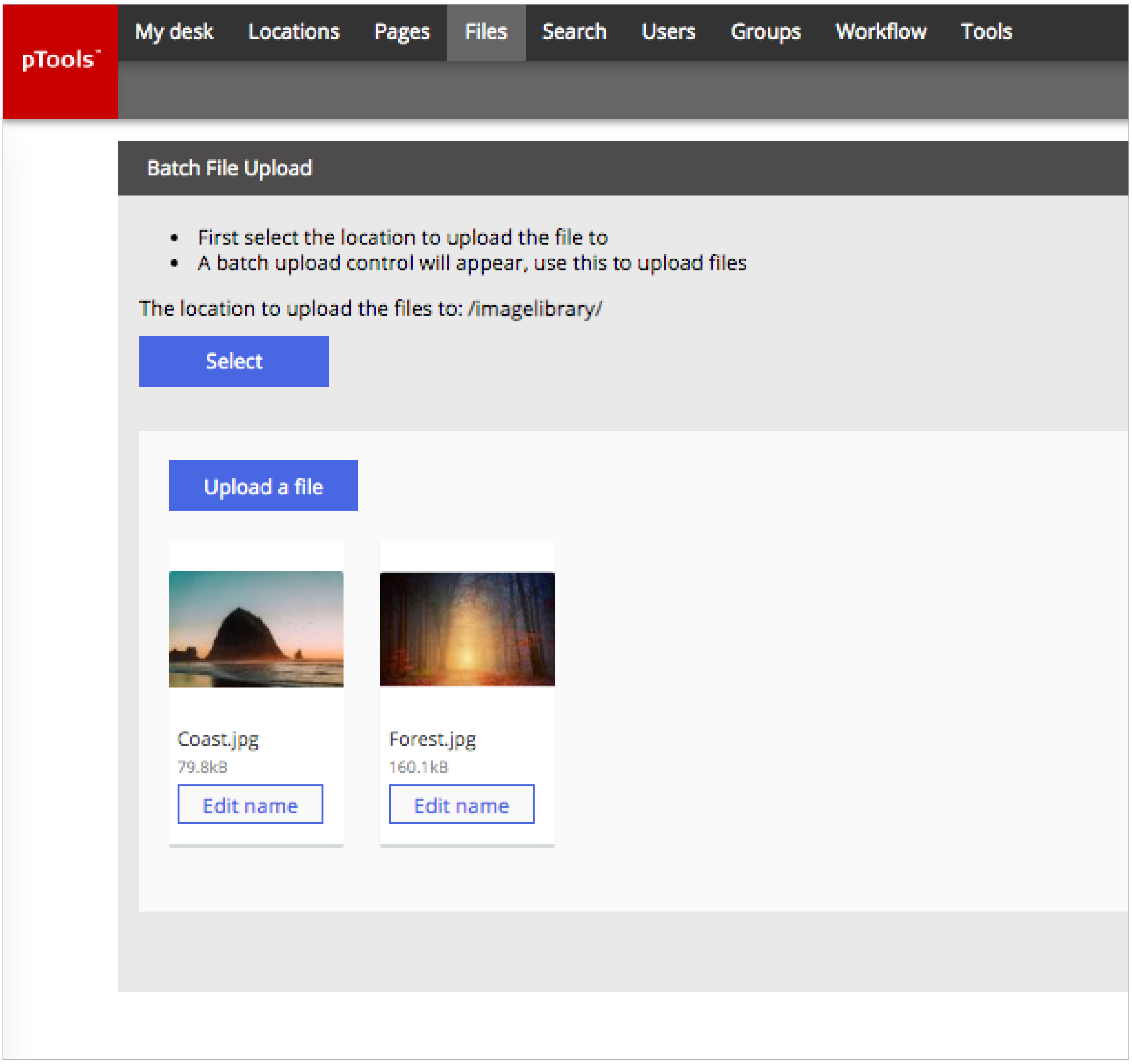
Files

You can do a batch upload of files. Hover over the Files tab (next to Pages) and select "Batch Upload". You will be asked which location to put the files before uploading by drag and drop. To view files in each location go to the files tab and then the location in the site structure list.

Files like images can then be embedded into the content of pages. Files like documents and pdfs can be added to a page using the 'Related' tab or the 'Internal links' icon in the content editor.

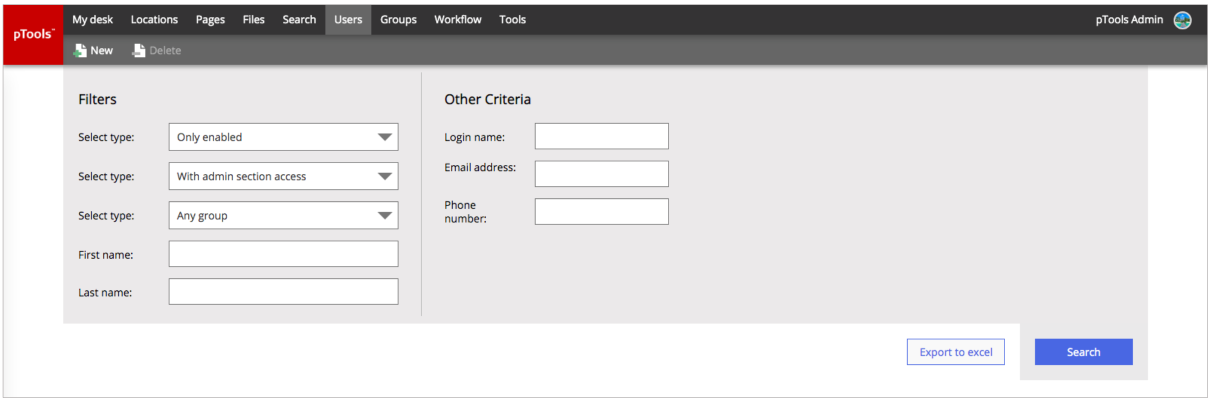


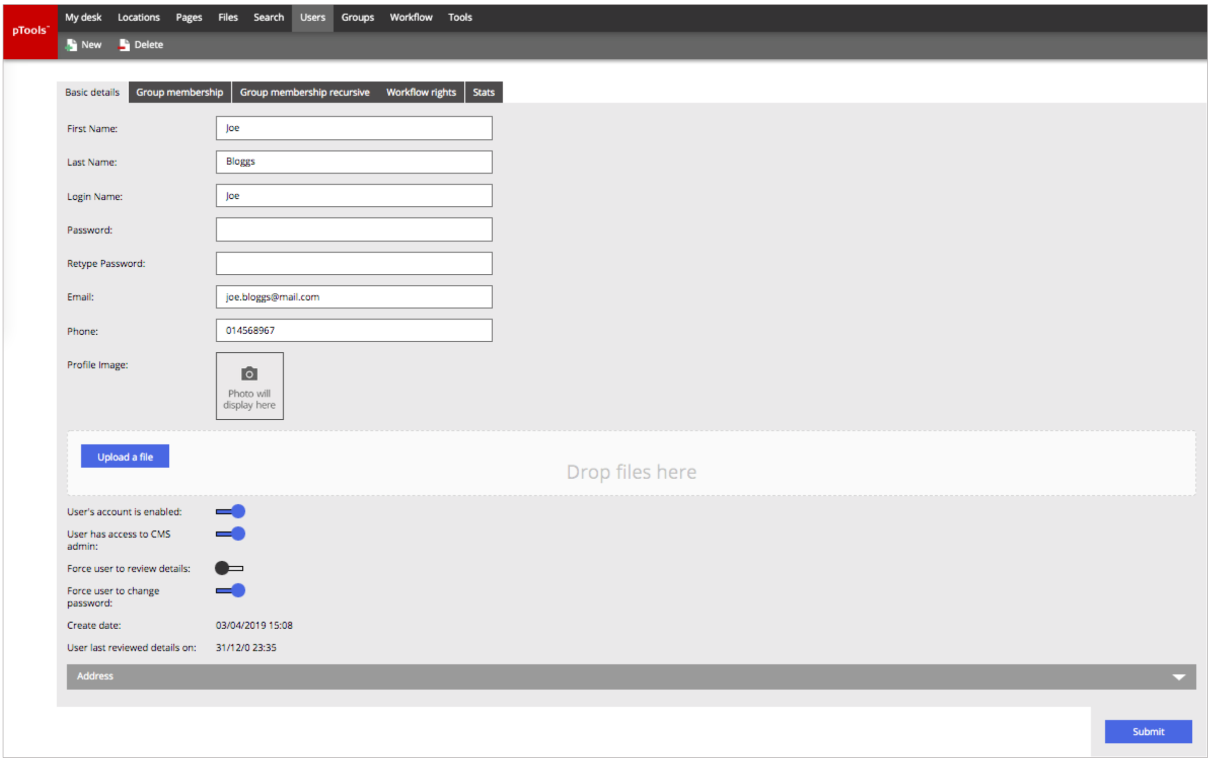



pTools
My desk
Locations
Pages
Files
Search
Users
Groups
Workflow
Tools
Batch File Upload
First select the location to upload the file to
A batch upload control will appear, use this to upload files
The location to upload the files to: /imagelibrary/
Select
Upload a file
Coast.jpg
79.8kB
Edit name
Forest.jpg
160.1kB
Edit name

Create a New User

Go to ‘Users’ on the navigation bar and select ‘New’ on the left-hand side under the navigation. Fill in the required fields in basic details and hit ‘Submit’.



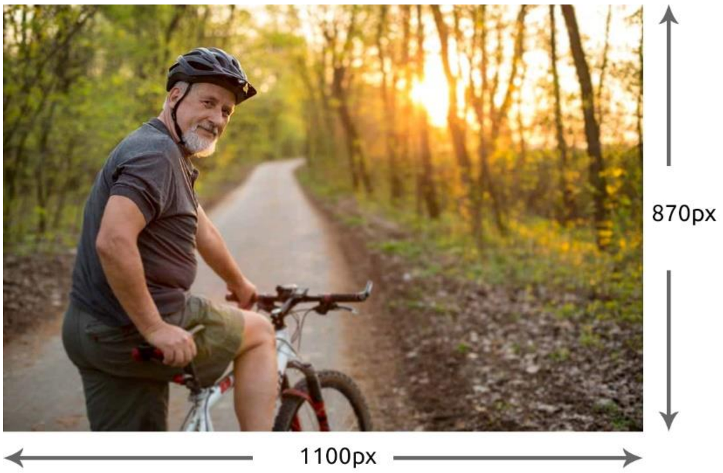


Images & Web Optimisation

Optimising images for the web means compressing or reducing the file size in order to reduce page load. **All images must be optimised before uploading to the CMS and used on the site.** Most images are JPEG format. However, logos or images with text such as infographics should be .PNG.

Software like Photoshop or any image manipulation software should allow you to save images at reduced file sizes, sometimes as a percentage or as a level out of 10 or 12. There are also numerous free online image compression sites that will reduce the file size.

Large image files will cause usability issues, especially on image-heavy pages such as the Homepage and other template pages. To avoid long page loads make sure big hero images and others are as small as possible in file size. Images on 1 or 2 Column templates should also be optimised and reduced to ideally less than 100kb and also less than 1100px wide (1 column) or 870px (2 column). The more images used on a page the more the file sizes will add up and reduce page load. If the total page image file size is over 700-900kb there will be a noticable page load time.



Original image (no optimisation). File size: 605kb.

Optimised image (saved with a quality of level 2 in Photoshop). File size: 45kb.
The images are almost indistinguishable but the file size is massively reduced.

How much to compress depends on the image quality and your judgement. Compress more until the image starts to visibly lose quality and become too pixilated. As long as the image quality looks satisfactory keep reducing file size until it doesn't, before that point is reached save the image and it will be web optimised. Resizing down the dimensions to recommended levels is a quick way to reduce file size. You can also have the original full-sized large images as a related file instead.

Full Screen or Large Images (Hero Images)

Hero images are the large, usually full screen images that are at the top of homepages for example. They are used to grab the users' attention and need to be high quality images before they are optimised. Main Carousel/Hero images should be jpeg and be no less than 1600px width if possible. This is not to say that the image cannot have larger dimensions as long as the file size is ideally below 300kb however the CMS will resize and centre the image to fit the required space. Square images may not work well as they will stretch when viewed on desktop or widescreen monitors. Check the carousel/hero image height in the template manual to see your recommended width and height.

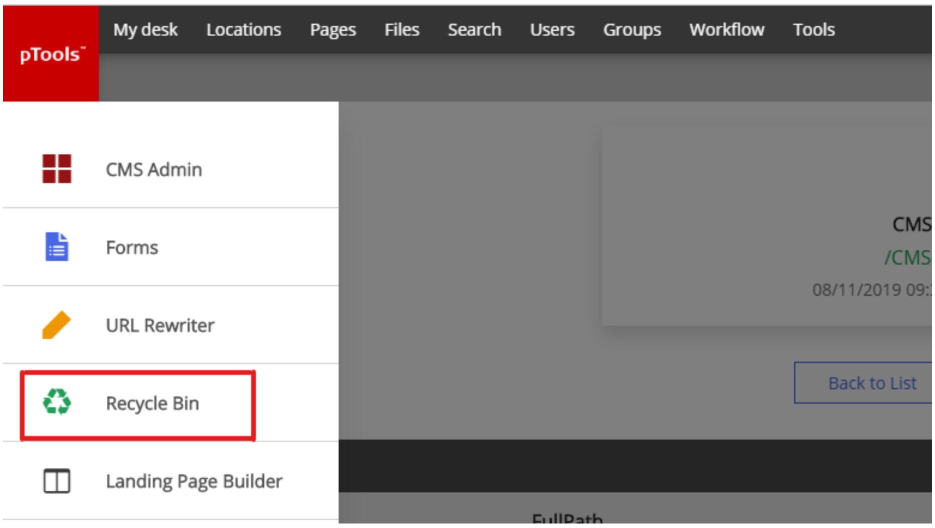
Images can be shrunk to reduce file size but be sure to keep the aspect ratio locked so that the image does not stretch or distort when resizing. Images should also be cropped to get the desired dimensions.

Original image. Dimensions : 6000 x 4456 (8,000kb)

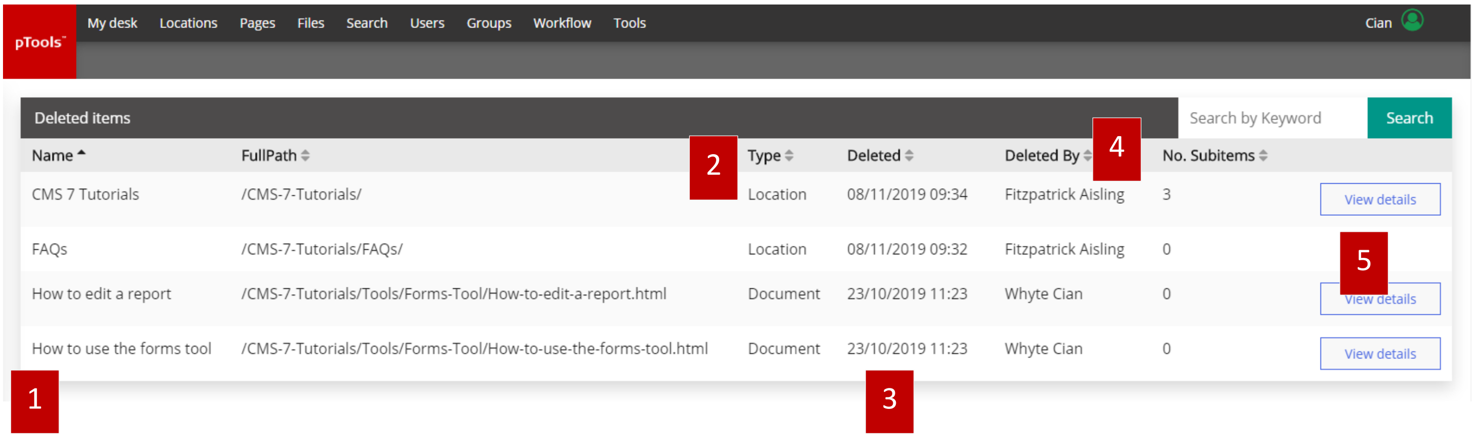
Dimensions shrunk and then cropped. Dimensions: 1900 x 600 (344kb - optimised)
(The particular template manual for the above hero image specified a 600px height.)

Recycle Bin

The Recycle Bin tool can be found by clicking the pTools icon in the top left corner of the CMS, and navigating to the bottom of the pop-up menu.



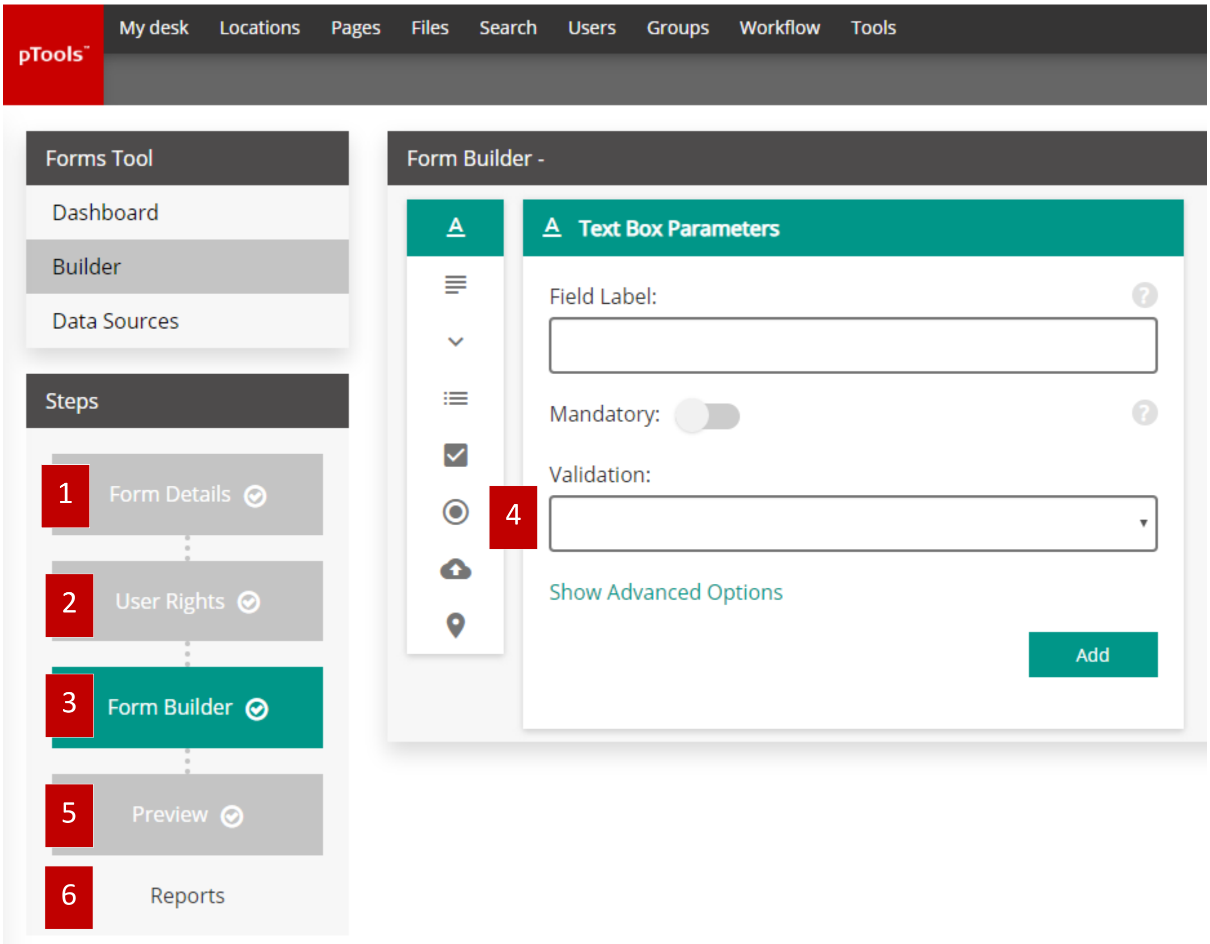
The Recycle Bin can be used to recover any deleted items, while detailing the time, date and user associated with the deleted item.



1. Name of the item that was deleted.
2. Type of item that was deleted (i.e. Page, Location, File, etc.)
3. Time and date the item was deleted.
4. User responsible for the deleted item.
5. To restore the item to where it was originally, select 'View details' → 'Restore'.

Forms Tool

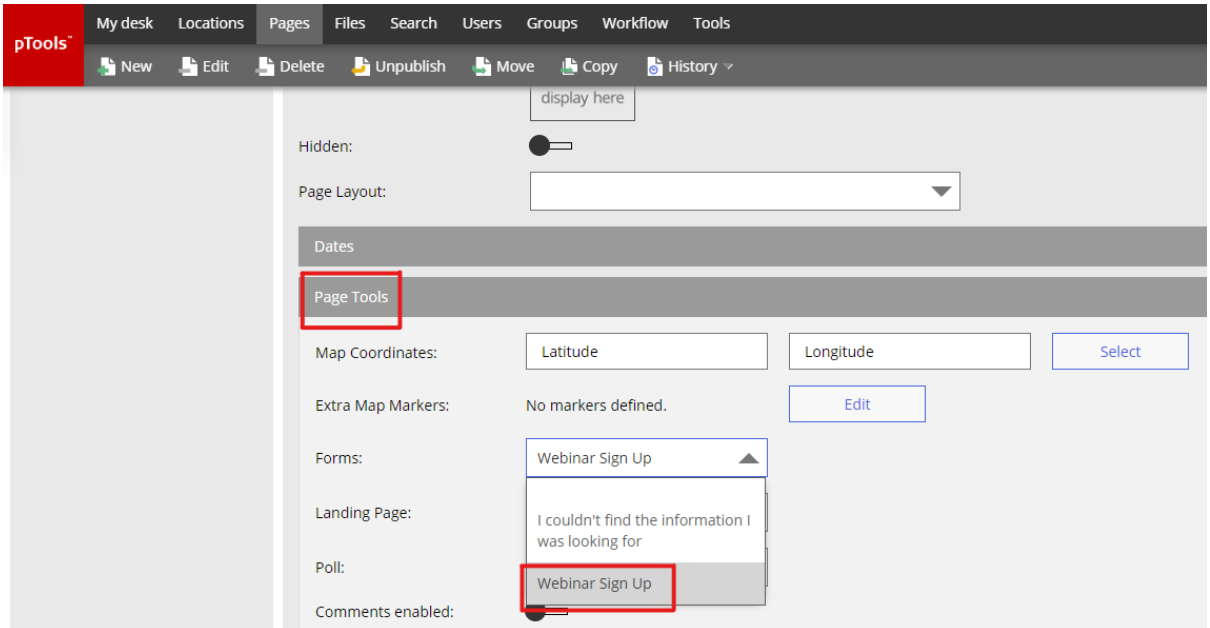
To build a new form, go to 'Tools' in the navigation bar and select 'pTools Forms Application'. This will bring you to the Forms Tool Dashboard, where you can build a new form, or edit an existing one. To build a new form, select 'Create Form'.



1. Form Details – Edit the title, description & some more advanced features of your form.
2. User Rights - Edit the form owners and who has access to the form's reports.
3. Form Builder – Edit the form's content. Navigate around different types of answer options, such as plain text box, checkboxes, upload a file.
4. Form Builder – Text validation can be used to restrict answers to a certain format (e.g. phone numbers must be in number format, etc.)
5. Preview – See what your form will look like on your site.
6. Reports – View and filter the form's responses. To export responses to an Excel spreadsheet, select 'Export to Excel'.

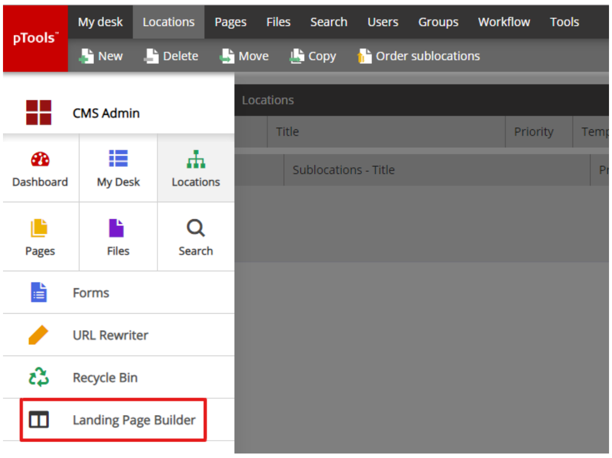
Forms Tool (Cont’d)

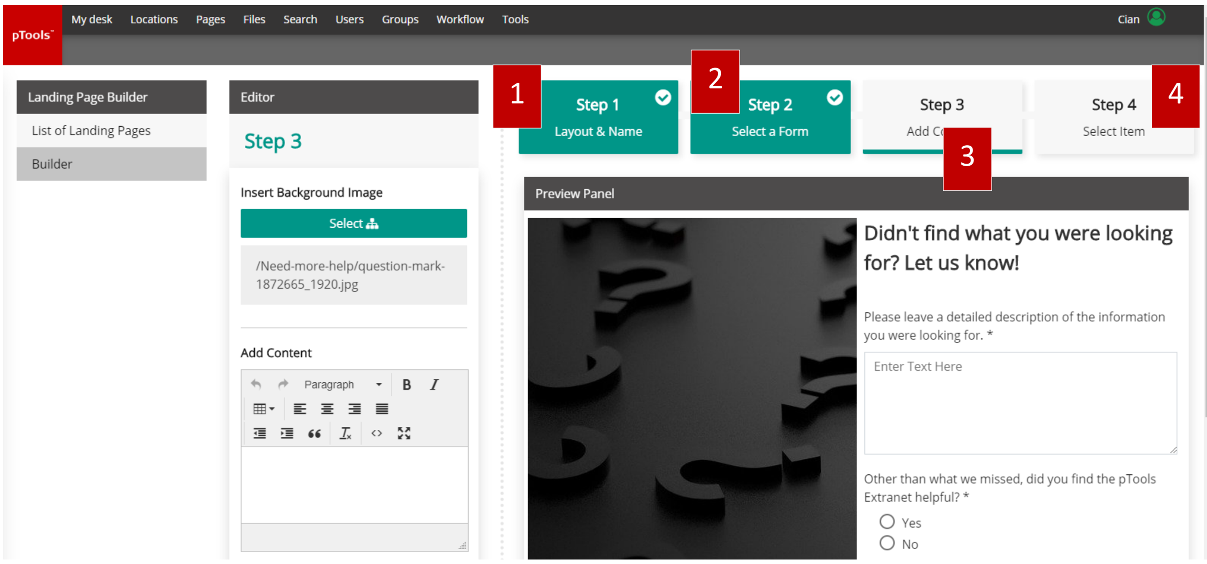
Once you have finished building your form, go to ‘Pages’ in the navigation bar. Select the page which you would like to populate with the form. In the ‘Basic Details’ tab, scroll down to ‘Page Tools’ and select your form. Don’t forget to save your changes at the bottom of the page.



Landing Page Builder

The Landing Page Builder can be found by clicking the pTools icon in the top left corner of the CMS, and navigating to the bottom of the pop-up menu.





1. Decide the layout and title of your new landing page template.
2. Select your pre-built form that you would like to use in your template.
3. Insert text & images to the template.
4. Edit the text on the submission button (e.g. 'Sign Up') and select 'Save Landing Page Template'.

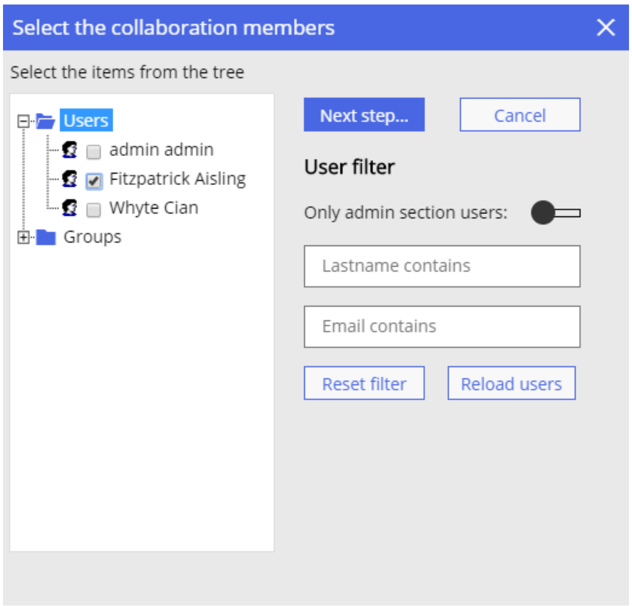
More Tools

Collaboration Tool

To collaborate with other users on a page, go to 'Pages' in the navigation tab and select the page you would like to collaborate on.

Select the Users/Groups you would like to collaborate with and select 'Next step…'.

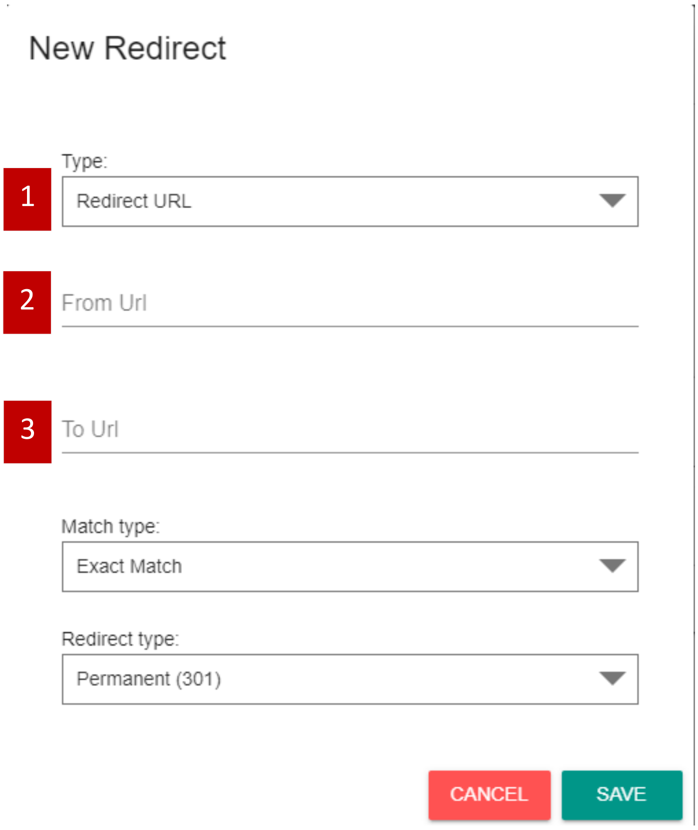
Finally, select the date the page should be completed by and add any relevant comments.



URL Rewriter

Under 'Tools' in the navigation tab, select 'URL Rewriter'. Select 'Add URL', which will bring you to URL Manager.

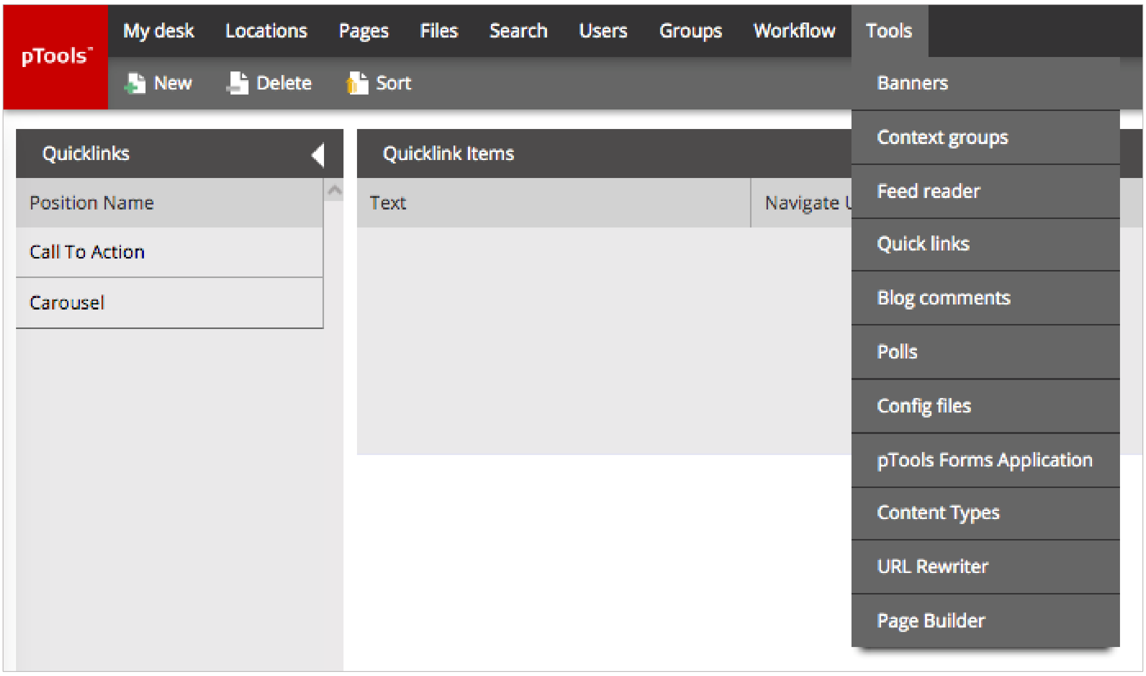
1. Set 'Type' to 'Redirect URL'.
2. Then, in the 'From URL' textbox, insert the URL you would like to be redirected from, e.g. 'www.ptools.com/Shorter-URL'.
3. In the 'To URL' textbox, insert the URL you would like to be redirected to, e.g. 'www.ptools.com/big-long-url-that-takes-long-to-type'.



Frequently Asked Questions

How do I define popular content (Banners and Quick links)?

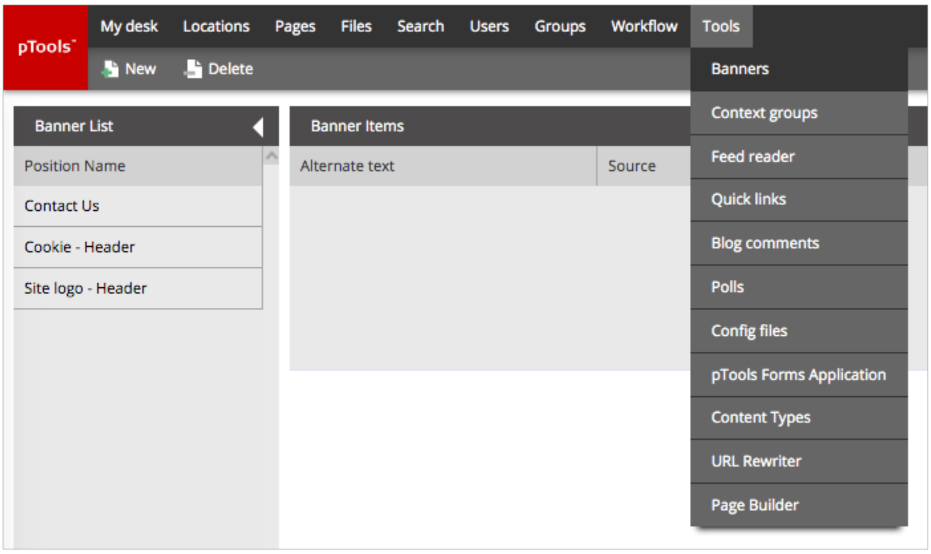
From the CMS top menu, select the Tools tab. From the dropdown menu select Banners or Quick links.

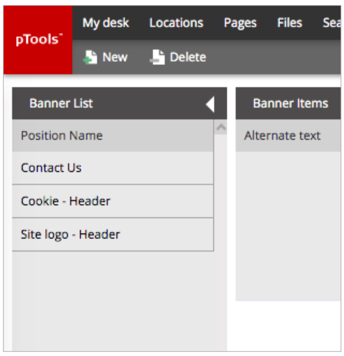


Each template could have its own Quick Links or Banners. In the example above, when a quick link is selected in the left side-menu, a quick link Items menu is displayed (the white space). This menu lists each iteration (item) of that quick link type. When you open a quick link item it will open its basic details. You can also create a new quick link item using the "New" button on the top left. This same process goes for banners, see below.

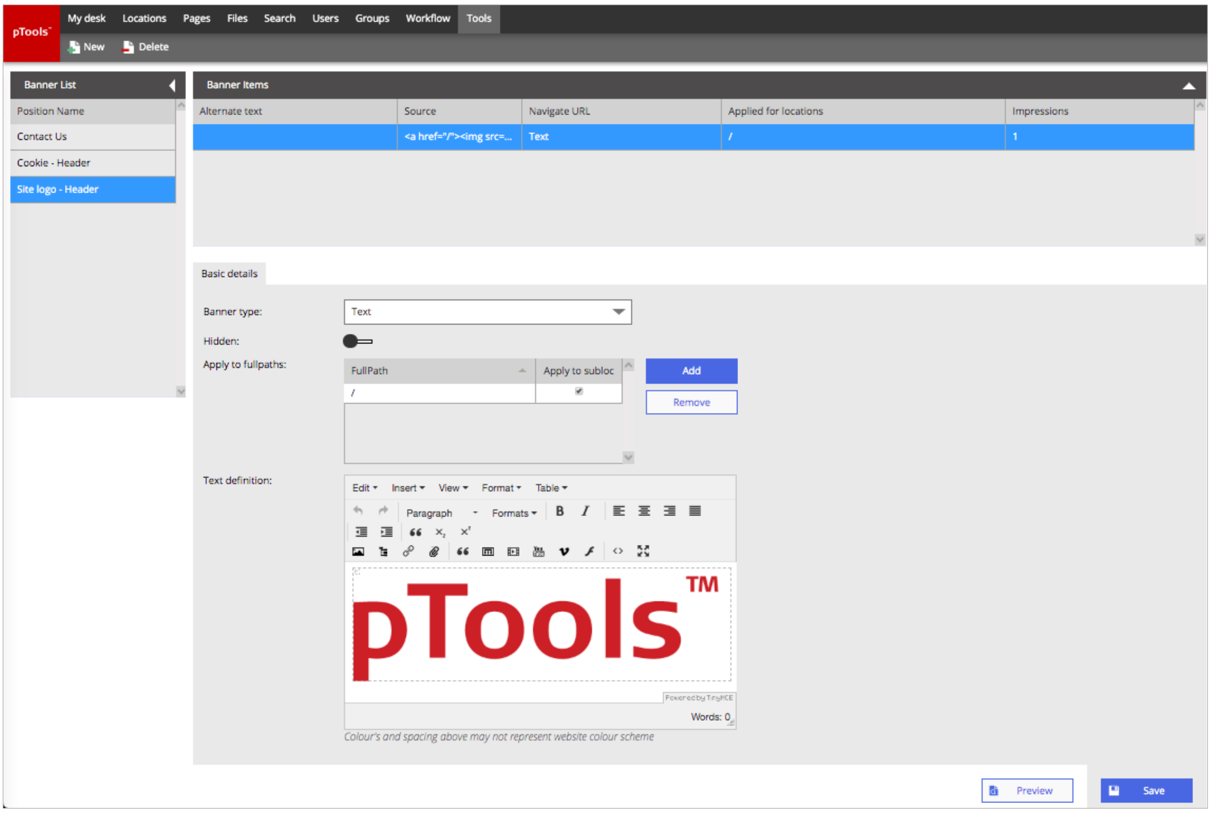
How do I update banners?

From the CMS top menu, select the Tools tab. From the dropdown menu select Banners.



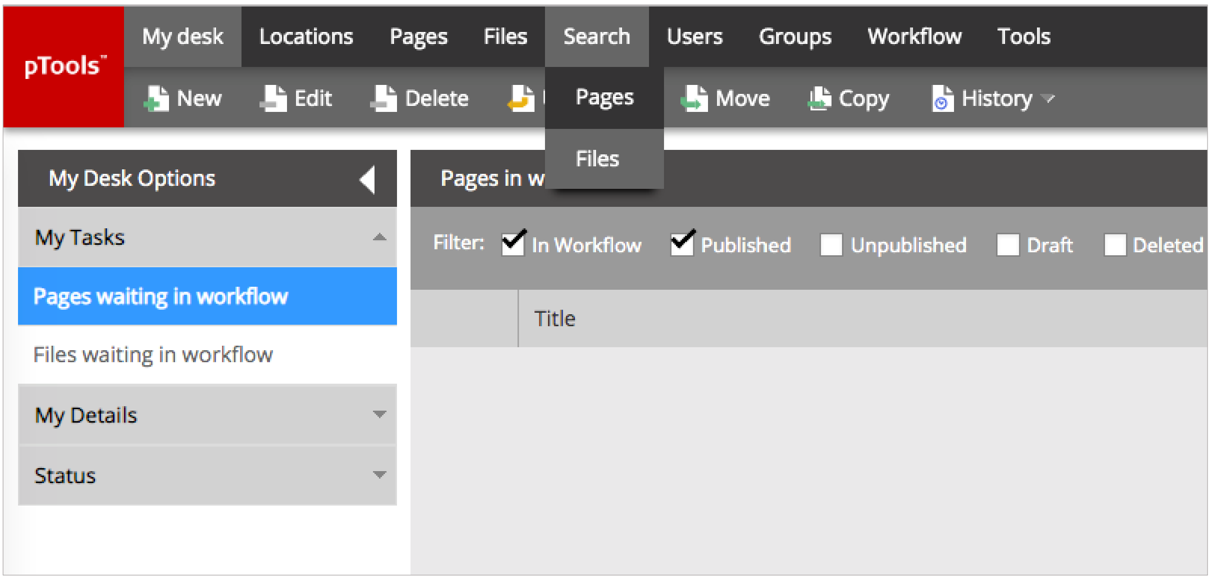


The side-menu lists selection of the items contained in the banner. When a user selects an item in the Banner Items list, they are presented with a text or image editor interface. This depends on the banner type chosen for that banner (see Banner Type). The template manual will tell you which type of banner to choose and what to edit or create to see the result on the output.



How do I find a page?

At the top of the window there is a menu from which you can navigate through the different sections of the CMS. To find a page in the CMS, first move the mouse cursor up to 'Search' and a menu will open. Select the option 'Pages'.

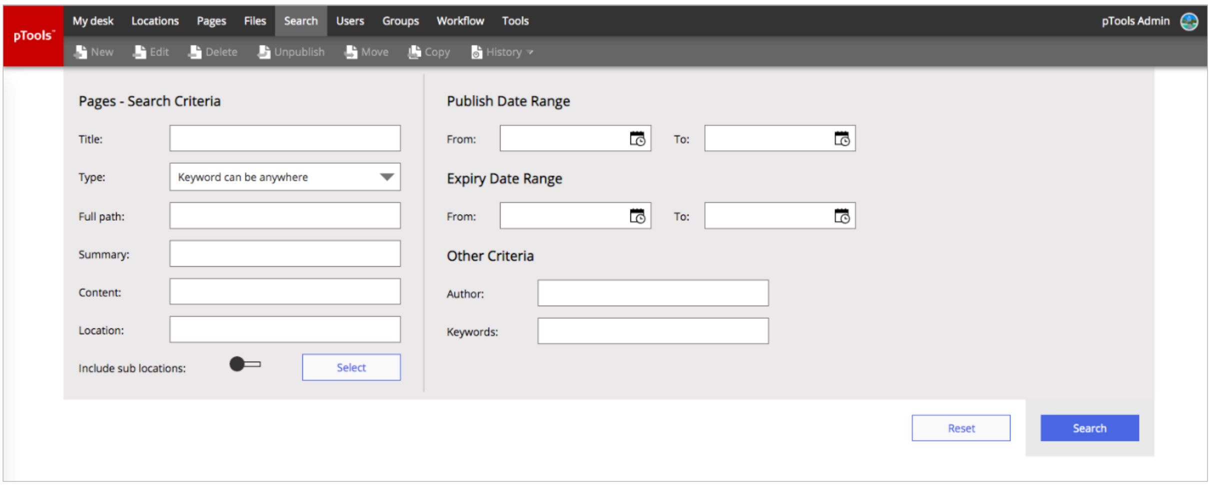


You should now see the 'Search' section of the CMS.

We can see a form with several 'text fields' has appeared on the left-hand side of the screen. In order to perform a search, we must fill in these fields and left-click on the 'Search' button below. You do not need to fill in every field on the search form, but you will receive a closer result by filling in more parameters.

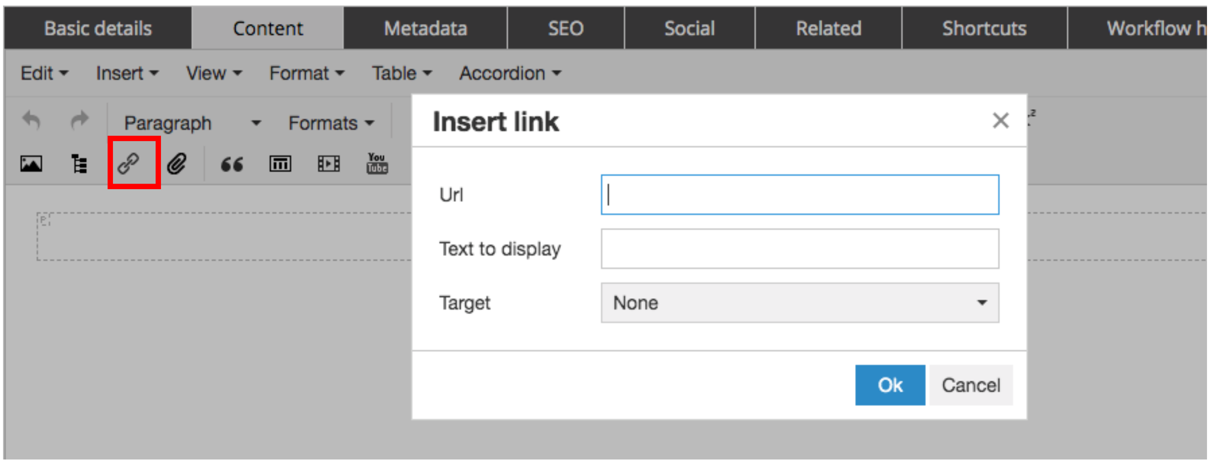
Now that this form is completed, left click on the button at the bottom of the form, entitled 'Search'.

The CMS will now begin searching for pages using the parameters you've entered on the search form. Once complete, it will display the files in a list on the centre of the page. Simply select a file from the list to begin editing.

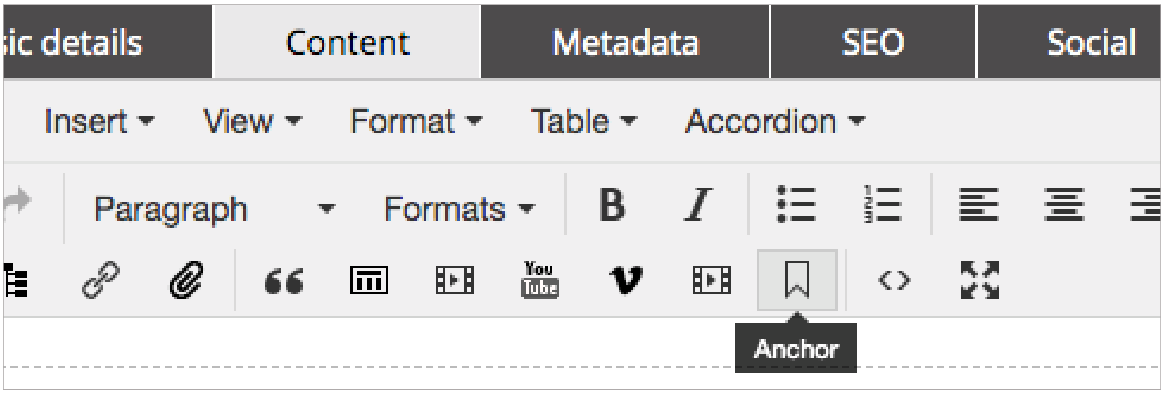


How do I create a Bookmark or Anchor?

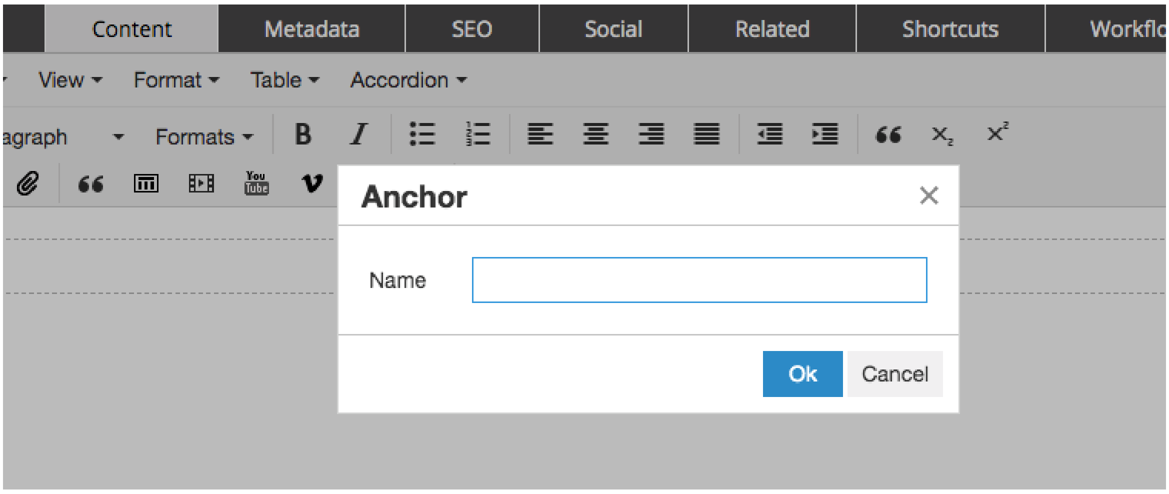
Hyperlinks can be used to create bookmarks and anchors inside a CMS document (page). Clicking on a bookmark link will focus the user onto the bookmark or anchor. This is particularly useful if there is a lot of content in a single CMS document as it allows users to skip to sections they are interested in quickly. In general the best strategy is to create a list of numbered or bullet point list at the top of the page, then create anchors over each heading within the page that should coincide with the list. Each list item can then be hyperlinked to the corresponding heading. (ie Intro, Middle Section, Conclusion etc.)



To create a bookmark link, highlight the text you want to turn into an anchor and select the anchor icon in the editor.



You will then be able to name the anchor so that you can recognise it later when you hyperlink text to it.

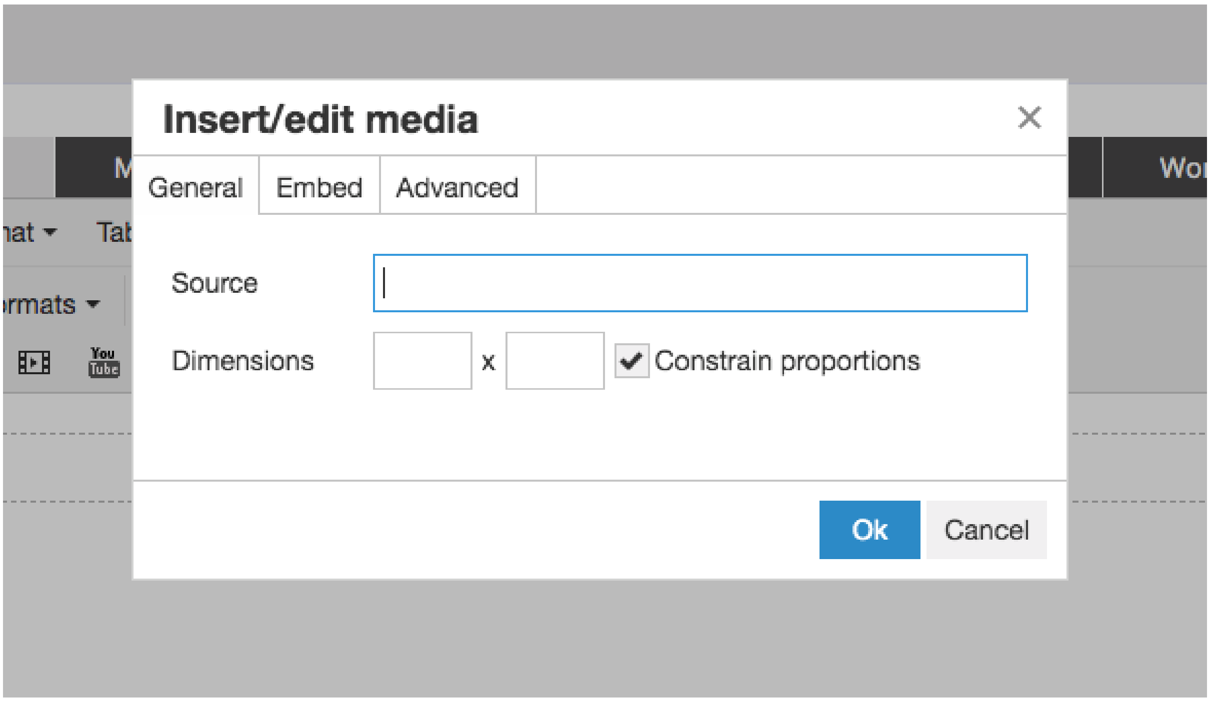


After you click OK the anchor will be created. You can then go to any piece of text in the document (page) and insert a hyperlink, when you open the insert link the option to select an existing anchor will also display, you can use the dropdown to find the name you had created for that anchor. When the user clicks on that piece of text they will be taken to the anchor you have created.

Some example of using the anchors could be an anchor on the first main heading of the page and a hyperlink to it from a piece of text at the bottom “Back to Top” for very long content pages. Other uses include replicating each heading in the content with its own text at the top of the page, to act like a table of contents that link to each section.

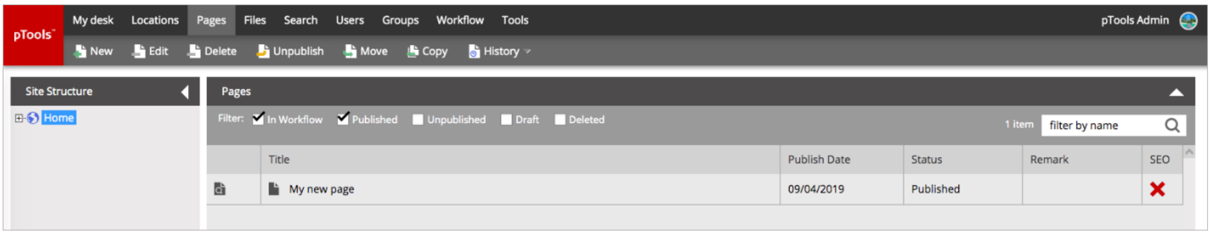
How do I upload or embed videos?

To upload a video in the CMS, click on the YouTube icon in the icon menu in the content area. This will open up a popup screen. On the popup screen paste the YouTube URL into the field labelled YouTube page URL, select what size resolution you want the video to be and click insert.



I can’t find my page

Browse to the location you published to or use the search page function.



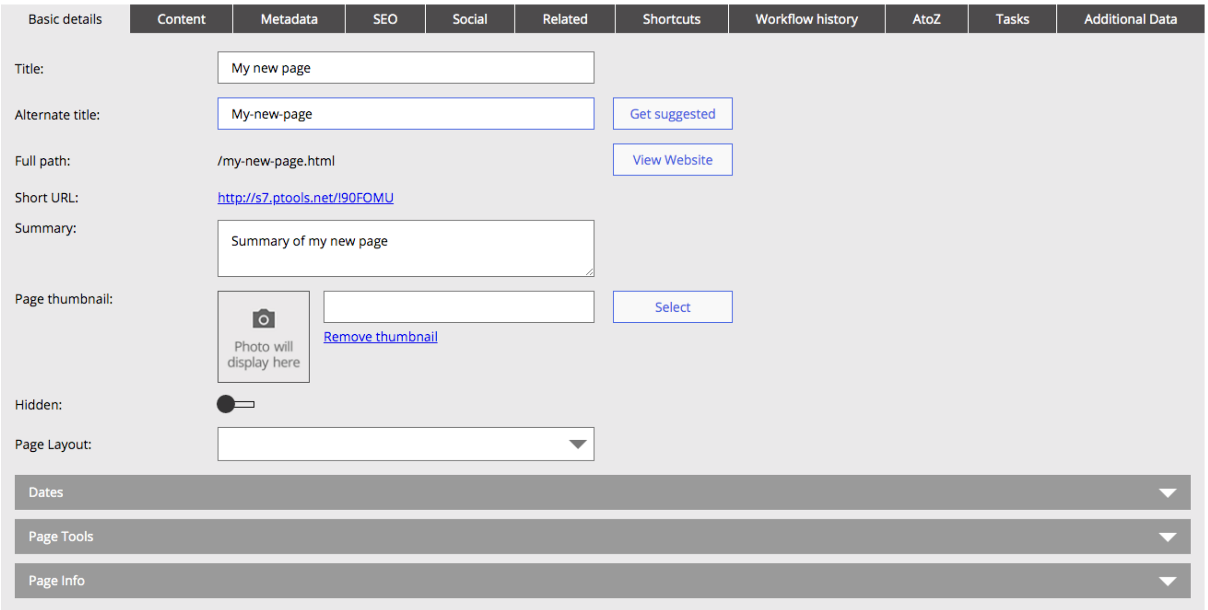
If you can’t see your page make sure that the filter items have been checked (the tick boxes above).

- Workflow – Shows all pages that are in the Workflow
- Published – Shows all pages that are Published on the website
- Unpublished – Shows all pages that are Unpublished in the CMS
- Draft – Shows all pages that are saved to Draft
- Deleted – Shows all pages that are marked as Deleted in the CMS

pTools and WAI

Use the clearest and simplest language appropriate for a site's content. Using clear and simple language promotes effective communication.

Provide a text equivalent for every non-text element. Computers cannot interpret images/videos and present them in a meaningful alternate format; alternative text gives the computer something to present to the user. Always use the "Get Suggested" button to create the Alternate title (this is the URI).



For data tables, identify row and column headers.

For data tables that have two or more logical levels of row or column headers, use mark-up to associate data cells and header cells.

Do not use the same link phrase more than once when the link points to different URLs.

If more than one link on a page shares the same link text, all those links should point to the same resource. Such consistency will help page design as well as accessibility.

When the same link phrase re-occurs, there is an implication that the links point to the same place. If they do not, users may be surprised and disoriented.

Create link phrases that make sense when read out of context.

Authors should not use phrases like "click here" as link text; this requires a user browsing the page with a screen reader to step through each link and read the surrounding text to determine the purpose of the link, instead hyperlink the actual description or title of the content, eg "Read More about the pTools Template Manual". This will also help with SEO as well as usability and accessibility.

Nest headings properly.

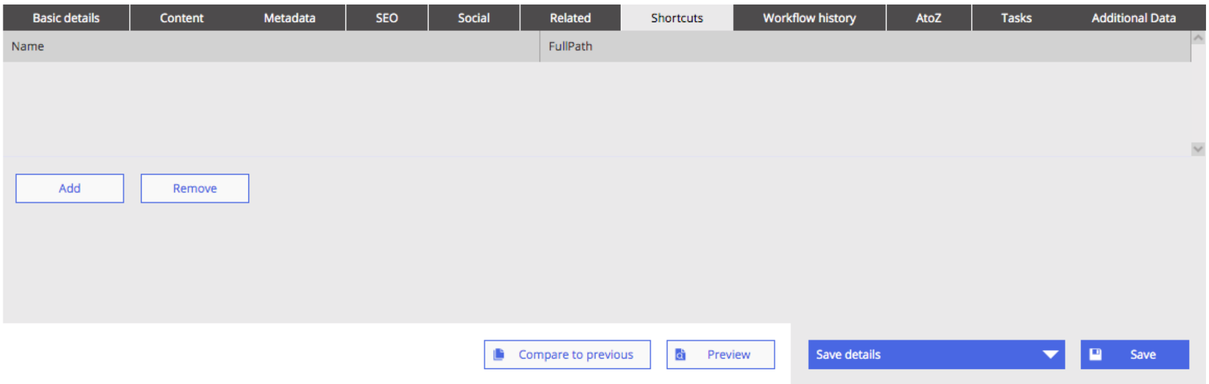
Increment heading levels correctly; for example, H1 followed by H2, rather than H1 followed by H3. Consider headings as analogous to an outline. The outline should not appear as:

I. Heading 1
1. Heading 3
A. Heading 2

Some users skim through a document by navigating its headings (the H1, H2, H3, H4, H5, and H6 elements). Some access aids extract the headings to create an outline of the page, allowing users to get an overview and jump quickly to a desired part. Incorrect nesting of headings will result in an incorrect outline structure which may disorient users.

How do I use a shortcut?

By utilizing 'Shortcuts' you can have your content auto update where you might have other instances of it.



What are 'Internal links'?

Internal links are used for links within the CMS. The link is attached to the object rather than the url. If the object is moved to another location the link will stay intact as it auto updates.