Lava New Media’s CMS

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Logging On to the Content Management System (CMS)

To login to your site’s CMS:

- Go to your Web site by entering your domain name then “/admin” (www.YOURSITE.com/admin/)
- Enter your username and password to login to your Web site’s CMS.

To logout:

- Click on “Logout” in the upper right-hand corner of the screen.

Introduction to the CMS

The CMS area is divided into 3 panels

- Top left: Page trees
- Bottom left: Admin menus
- Right: Editing area
What is the page tree?

This is a list of all the pages in the Web site, arranged in a hierarchical order. This is where you select the pages you want to edit, add, delete, move up or move down. Pages that you have access to edit will be in blue (clickable) and pages that you do not have access to edit will appear in gray. The page tree is accessible by clicking on the “Pages” button on at the bottom left corner of the CMS.

You can use the page tree icon menu to perform actions on the tree by right-clicking on any page in the page tree and selecting the appropriate action.
Editing Web Pages
To update existing content on the site you need to:

- Click on the Pages button at the bottom left of the screen
- Locate the Web page in the page tree.
- Each page has four accordion subsections. If the page you select to edit currently has content, the first accordion is open by default (Page Content). If you are creating a new page, the Page Information accordion will be open.

- The Page Content accordion is the main WYSIWYG editing area.

  o To edit page content click on the document’s name, or right-click and select “Edit this page.”
  o Open the page to edit.
  o Edit the page with the Rich Text editor (see “How to use the Rich Text Editor”).
Save the page.  
Preview the page in a browser window.  
Publish a page.  
If you do not have permission to directly publish to the live Web site, you may not be able to see the publish button, in which case simply click “Submit for Approval”.

- The Page Information accordion is where you may make a page active or inactive to the general Web site visitor, supply a title and an alias for the page for improved search engine visibility. If you place a URL in the “Custom URL” field, the general Web user will be taken directly to that URL when they click on the page name in the main site navigation. This option is used when you would like to redirect a user directly to another section of your site without creating a landing page.
- The **Page Metadata** accordion is where you may enter the pages meta title, keywords and page description.

- The **Versions** accordion is a complete list of previous page versions. Here can restore selected version of the page (i.e., unlimited undos).
How to use the Rich Text Editor

The Rich Text editor is similar to using Word. However there are a few crucial things to remember when working with a Rich Text editor online.

Save your work often! You WILL remember to do this after you have lost a substantial amount of formatted text, because the admin area has timouted or your internet connection drops.

Don’t copy and paste from MS Word. First copy any text to Notepad or another plain-text editor, and then copy the text into the Rich Text editor.

There are a number of buttons on the Rich Text editor’s toolbar. Depending on your site configuration, you may see more or fewer buttons on your editor’s toolbar.

In the live CMS, roll your mouse over the icons to see tooltips. We provide some tips below.

- **Source** - view and edit the HTML source code.
- **Preview** - of limited use in LNM’s CMS
- **Templates** - your web developer will advise you if these are to be used. In most cases, it will be more effective to use separate page Templates and Template Variables.
• Cut, Copy, Paste - you can also use standard keyboard shortcuts.
• Paste from MS Word - If you must copy from MS Word, use this. Not recommended.

• Find, Replace - self-explanatory.
• Remove Format - can be a little inconsistent. For example, if you have applied a format over a heading style, then the Remove Format button does not work. You have to toggle the style to normal and then toggle back again. Sometimes you may have to turn on Source to remove excess format tags.

• Bold, Italic, Underline - all self-explanatory. Try to avoid underlining your content, as your visitors will presume that the underlined text is a link.
• Lists: number and unordered – self-explanatory. Similar to MS Word list functionality.
• Indent and Outdent - are useful for positioning text such as quotes, or positioning images off the margins. Make sure that you Preview the changes, as in some designs Indenting text may have unforeseen consequences on other aspect of the design.

• Text justification - these should be used sparingly. In most cases Lava New Media will have made conscious choices about the text justification that are reflected in the CSS styles available in the Format and Styles dropdown.
• Links - used to insert internal and external links (see FAQs below).
• Images - used to upload and insert images (see FAQs below).
• Tables - used to insert and modify tables.
• Horizontal Rule - insert a horizontal rule.
• Special characters - insert special characters like © and ™.

Rich Text Editor User’s Guide

<table>
<thead>
<tr>
<th>Icon</th>
<th>What it Does</th>
</tr>
</thead>
</table>

Page 10
<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Source" /></td>
<td>View or edit document source code (for advanced users).</td>
</tr>
<tr>
<td><img src="image" alt="Preview" /></td>
<td>Preview what the HTML page will look like for users.</td>
</tr>
<tr>
<td><img src="image" alt="Layout" /></td>
<td>Select a layout template. See “Templates” for details.</td>
</tr>
<tr>
<td><img src="image" alt="Cut" /></td>
<td>Cut the highlighted text to the clipboard.</td>
</tr>
<tr>
<td><img src="image" alt="Copy" /></td>
<td>Copy the highlighted text to the clipboard.</td>
</tr>
<tr>
<td><img src="image" alt="Paste" /></td>
<td>Paste the text you copied (with or without formatting)</td>
</tr>
<tr>
<td><img src="image" alt="Content" /></td>
<td>Copy content from Microsoft Word, and then paste it into the Rich Text editor using the pop-up accessed from this icon.</td>
</tr>
<tr>
<td><img src="image" alt="Print" /></td>
<td>Print the HTML page.</td>
</tr>
<tr>
<td><img src="image" alt="Spell" /></td>
<td>Spell check the HTML page.</td>
</tr>
<tr>
<td><img src="image" alt="Undo" /></td>
<td>Undo or redo the most recent action taken.</td>
</tr>
<tr>
<td><img src="image" alt="Find" /></td>
<td>Find a word or phrase within the text of the HTML page.</td>
</tr>
<tr>
<td><img src="image" alt="Replace" /></td>
<td>Find and replace a word or phrase within the text.</td>
</tr>
<tr>
<td><img src="image" alt="Select" /></td>
<td>Select all of the text in the HTML page (usually used before copy or cut or to apply a style or format to the whole page).</td>
</tr>
<tr>
<td><img src="image" alt="Remove" /></td>
<td>Remove the formatting from highlighted text... <em>(You must select the text first)</em></td>
</tr>
<tr>
<td><img src="image" alt="Bold" />, <img src="image" alt="Italic" />, <img src="image" alt="Underline" />, <img src="image" alt="Strike" /></td>
<td>Bold, italic, underscore or strikethrough highlighted text.</td>
</tr>
<tr>
<td><img src="image" alt="Superscript" />, <img src="image" alt="Subscript" /></td>
<td>Superscript or subscript the highlighted text.</td>
</tr>
<tr>
<td><img src="image" alt="Number" />, <img src="image" alt="Bulleted" /></td>
<td>Add numbering or bullets to highlighted text lines.</td>
</tr>
<tr>
<td><img src="image" alt="Indent" /></td>
<td>Increase or decrease the highlighted text's indentation.</td>
</tr>
<tr>
<td><img src="image" alt="Alignment" /></td>
<td>Alignment of highlighted text (left, centered, right, justified).</td>
</tr>
<tr>
<td><img src="image" alt="Hyperlink" /></td>
<td>Add or remove hyperlink from highlighted text. Also used to manage file uploads and links to files on the web server.</td>
</tr>
<tr>
<td><img src="image" alt="Upload" /></td>
<td>Upload or insert your own or other's images into the HTML page.</td>
</tr>
<tr>
<td><img src="image" alt="Table" /></td>
<td>Insert table. Number of columns or rows, and table width, height, borders, &amp; alignment can also be set.</td>
</tr>
<tr>
<td><img src="image" alt="Divider" /></td>
<td>Insert divider line (horizontal rule).</td>
</tr>
<tr>
<td><img src="image" alt="Symbols" /></td>
<td>Insert symbols &amp; special characters (trademarks, currency, etc.).</td>
</tr>
<tr>
<td>Insert page break. Only impacts printed version.</td>
<td></td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Style</strong></td>
<td>▼</td>
</tr>
<tr>
<td><strong>Format</strong></td>
<td>▼</td>
</tr>
<tr>
<td><strong>Font</strong></td>
<td>▼</td>
</tr>
<tr>
<td><strong>Size</strong></td>
<td>▼</td>
</tr>
</tbody>
</table>

Styles & formatting determine the appearance of HTML text. You may also use the drop down boxes to style specific elements (such as headings), or set overrides for font face, font size, etc. To remove the applied style, select the style name again.
FAQs

Can I copy directly from Word?
NO. This is the most common mistake with editing. Always copy text from Word into Notepad before copying into the Rich Text editor. Very important! After you have pasted from Notepad, you can remove any line breaks by using Delete on the previous line. If you do paste from Word, use the button.

How do I use heading styles in the Rich Text editor?
You should use the Format dropdown to style your text.

- Select the text you want to style.
- Select the style you want to apply from the style dropdown.
- To reset to standard text, select Normal. If a style is not changing, try toggling it to another style and back again.
How do I format text in the Rich Text editor?

We recommend that you primarily use the heading styles set by Lava New Media (see previous FAQ).
How do I insert images?

Click on

- Click the Browse Server Button, and then select the image you want to insert from the folders to the right, double-click the image and click OK.
- If you need to upload a new picture, click Upload first and select the image to upload (be sure it is .gif, .jpg, or .png and optimized for the web) (see tips below).
- Click Upload Selected File.
Double-click the image that you want and click OK.

**Can I insert any image [TIPS]?**

You can only use PNG, GIF or JPG images in a web page.

- You can use most photo-editing software to convert TIF or BMP images to JPG or GIF. You can even use the very basic `Paint` program in Windows to *save as* JPG or GIF format.
- Check that the JPG or GIF images are not too large. You can see the size in the image editor. You should look for the width dimensions in pixels (px).
- All PNG, GIF or JPG images must be saved as RGB color and at a 72 dpi resolution.
- If you have multiple images on a page i.e. product images, they should be the same width for design consistency. This should not be more than 300px wide, and in most cases would be between 100-200px.
- Most image optimizers do not work with PDF files. For best results, without a PDF-exporter application (i.e. Adobe Acrobat NOT Reader), you can take a JPG screen shot of the image in the PDF document.

**How do I insert a link?**

To insert a link in a document:

- Select the text or image that you want to link from.
- Click on ![link](image)
- The following dialog appears
To link externally just type the URL for the site into the URL box.
• To link to an internal page, select Internal from the Link Type dropdown menu and then select the internal page you wish to link to.

• After you click OK, the link will appear in the Rich Text editor as blue underline text. However on the front-end of the Web site, the links will styled in CSS by Lava New Media.

• If you want the link to appear in a new window you can set the target as “_blank”
• You can also create a JavaScript popup which offers you more custom control:
How do I insert links to PDF and other document files?

- Select the text that you want to link from. We recommend that you always put the .pdf extension on the end so that user will know that the link leads to a PDF document, not another page. (i.e. Policies.pdf)

- Click on the icon, select URL from the Link Type dropdown menu, and then click the Browse Server button.

- Select a PDF or file to link to or selected the Upload button from the top of the window to upload a new file to the Web server. Uploading documents is accomplished by clicking on the “Upload” button and then browsing your hard drive for the correct document to upload.

- OK.
- Save.
What is contained in the “Items” section?

“Items” are Custom Content Items specific to your particular Web site’s needs.

The most common of these are Calendar Events. These Calendar Events will be used in this tutorial.

- Click on the “Items” button on the lower left corner
- Where the page tree was displayed, you will now see a list of Custom Content Items specific to your site

- Click on the appropriate item on the item tree to edit.
- In the layout area, you will see a list of these items. Normally no matter what type of item you are dealing with, you will be presented with 3 options:
  - Add – this will add a completely new item
  - Edit – this will edit the selected item
  - Delete - this will delete the selected item
- When you click add or edit, you will be presented with an area to input the event fields.
- Based on your permissions, you may click “Publish” or “Submit for Approval”
How do I add users to the CMS?

Users are added to the CMS by clicking on the main navigation button called “Users.”
Please note that you may not see this tab when you log in if you are not a Master Admin of the site.
• Clicking on this main “Users” tab will load the list of current users into the Users tree area.
• From this page tree you may add, edit or delete a CMS user.
• To add a new user, simply click on the “Add New” link at the top of the Users tree.
• To edit a user, either click on the user’s name in the Users tree or right-click (shown below on the right) on the user’s name and select “Edit User.”
• To delete a user, simply right-click on the users name and select “Delete User.” This action will **permanently** remove the user from the CMS. This action cannot be reversed.
To add a new user, you will need to fill out the following information:

- **Username** – This is the username the new CMS user will need to login to the CMS

- **Password** – This is the password the new CMS user will need to login to the CMS

- **Email** – This is the user’s email account that the CMS will use to send out notification emails. Please make certain that this email address is active and correct.

- **First Name** – User’s first name

- **Last Name** – User’s last name

- **User Roles** – These are the roles that each user may have.
  
  - Add – the user may add content to the CMS
  
  - Edit – the user may edit content in the CMS
  
  - Delete – the user may delete content and pages within the CMS
  
  - Move – the user may move content and pages within the CMS
  
  - Publish – this option will give the user the ability to make changes to the live Web site. All publishers have the rights to publish content to the live Web site. If a user does not have either Publish and/or Master checked they will only be able to submit content for approval. They will not be able to publish content to the live Web site.
  
  - Master – this option overrides all of the above. By selecting this option you will give a user access to all of the pages and items of the site as well as the ability to add, edit and delete users of the CMS. Once this box is checked, there is no need to assign content permissions as this user will have access to all areas of the Web site and CMS.

- **Content Permissions** – This allows you to assign right to users to access certain pages, items and functionality of the site. If a CMS user has publishing rights (but does not have Master checked) you may selectively grant access to individual pages and items of the site by clicking on the appropriate check boxes in this section. In the Global column, you may grant access to a user to allow them to add, edit and/or delete users of the CMS.