T4 CMS Version 8 Basics Guide for Content Editors

Access level: Moderator

This **guide covers the basic functions** of T4 Content Management System Version 8 for users with Moderator access.

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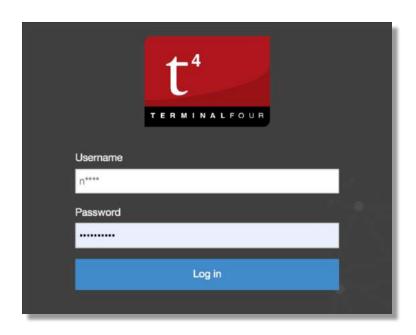
Login to T4 Version 8

T4 Content Management System is browser based, enabling you to work on or off campus:

- **do** use **Chrome**, **Firefox** or **Safari** browser to access the system.
- don't use Internet Explorer (IE doesn't support the functions of the CMS)

To access T4 CMS go to:

https://t4v8.ncl.ac.uk/terminalfour/login.jsp



and use your Windows username ('n' id) and password to login

This login will give you access to your website and to the Media Library folders associated with the site.

Access level

Your access level is Moderator. As a Moderator, you can:

- edit content
- add new content
- Approve and Publish content

You may have access to all sections of your site, or it can be restricted to just a number of sections, eg News, Events, Staff, depending on need.

T4 Interface

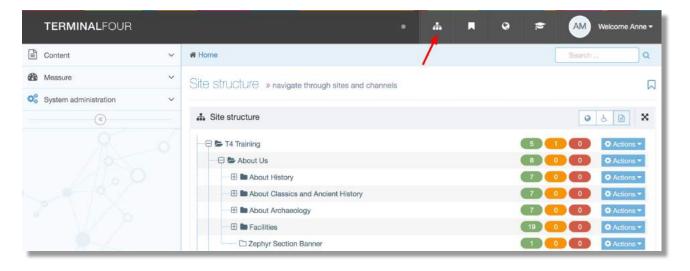
When you log in to T4 you'll see your **Site Structure** as the default page. The Site Structure displays the Sections that make up your website.

The **Site Structure** makes adding, moving, duplicating and deleting Sections as straightforward as managing folders on your PC. You can also:

- get an overview of the status of content
- see the **number of content items** in a section
- access the **Section Action Menu** which provides options for editing content, Sections and Publishing

Site Structure

The Site Structure has a **button in the Header** so you can return to it regardless of what screen you are on:



Section Icons

In the Site Structure, you will see different Section types. Each type has an icon:

Icon	Icon Name	Description
*	Root Section	The Section is level one of a Channel or Microsite
	Normal Section	The Section publishes and is available in Navigation Objects.
	Pending Section	The Section status has been set to "Pending". Updates will not be published until this is changed to "Approved".
	Inactive Section	The Section status has been set to "Inactive". Updates will not be published until this is changed to "Approved". When a Section has been deleted the status is also set to "Inactive". You can set it to "Approved" in the Edit Section screen to ensure it publishes again.
	Hidden Section	The Section publishes but does not appear in Navigation Objects.
8	Internal Link Section	The Section links to another Section within the Site Structure
	External Link Section	The Section links to an external URL
	Destination Mirrored Section	The current Section has been mirrored from another Section.
•	Origin Mirrored Section	The current Section is mirrored in another Section.
	Destination Mirrored Hidden Section	The current Section is mirrored in another hidden Section
	Origin Mirrored Hidden Section	The current hidden Section is mirrored in another Section.
0	eForm Section	The Section allows content to be added using an eForm.
-	Archive Section	Content in this Section will not update on Publish.

Content Status Column

Use the Content Status column to **check if content has been Approved for publish** or is still Pending:



Green: number of **Approved** content items

Orange: number of Pending content items

Red: number of Inactive content items.

Actions Menu



The options available in the Section Actions Menu allow you to select a section and make changes to that section (page), or the content within the section. Options commonly used are:

- **Create** section
- Edit section
- Preview section
- **Duplicate** branch
- Delete section
- Create content
- Edit content
- Delete content
- Publish section
- Publish branch

Preview Content

As part of your Quality Assurance process, you can view how content will look before it has been approved, to check that the page will look as intended when it's published.

The content that will be previewed is the last saved content, which may be different from the currently approved content on your live site.

The preview will open in a new tab or window (depending on your browser preferences).

You can **Preview a page directly from the Site Structure**, which saves you drilling down into the content of the page.

You can also **Preview a Content Item** from the Edit Content page, **to see how it will look within the page**.

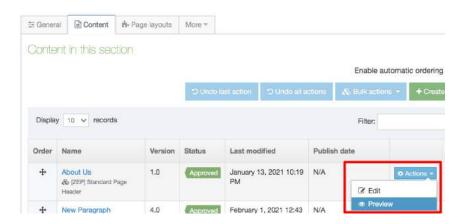
Preview a section from the Site Structure



Use the **Site Structure** to **pick the Section you want to preview** and, from the Section Actions Menu, select **Preview Section**.

Preview a piece of content

From the **Content Table** click the **Actions menu** and select **Preview**:



or **from within the component** - click the green Preview button:

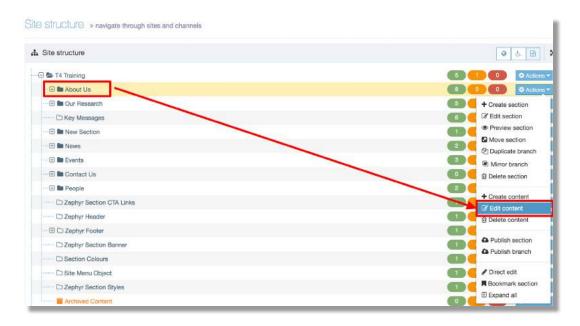


Edit Content

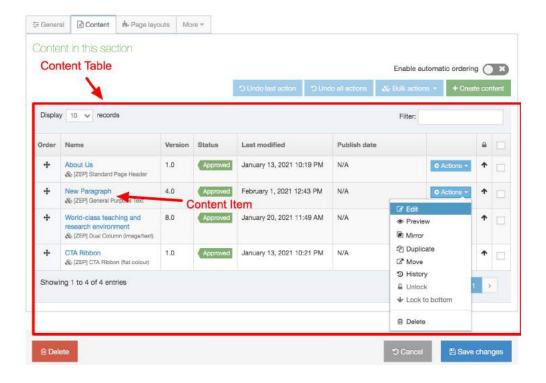
To edit content first **find your Section in the Site Structure**.

Edit Content from Site Structure

In the Site Structure, **select the Section** with the content you want to edit. From the Section Actions menu select **Edit Content**:



This opens the **Content tab** in the selected Section. From here you can **view the Content Table** and **choose the Content Item** you intend to edit.



The **content table displays 10 content items** as default. Use the drop-down to view ALL items that make up your page content.

The **buttons** at the top and bottom of the **Content Table** are:

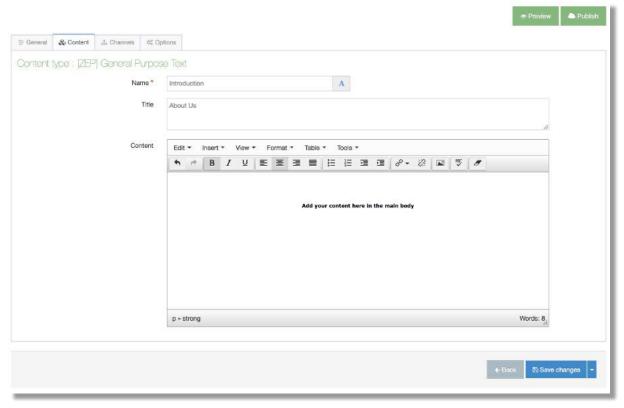
Item	Description			
Above Content Table				
Undo last action	Undo the last re-ordering action			
Undo all actions	Undo all content re-ordering actions			
Bulk actions	This is a drop-down menu of options which can be applied only if multiple Content Items are selected. These options are: Bulk Mirror: Mirror the selected Content Items to another Section Bulk duplicate: Duplicate the selected Content Items to a new Section Bulk move: Move the selected Content Items to a new Section Bulk lock top: Lock the selected Content Items to the top of the ordering table when Automatic Ordering is enabled Bulk lock bottom: Lock the selected Content Items to the bottom of the ordering of the ordering table when Automatic Ordering is enabled Bulk unlock: Unlock the selected Content Items that have been locked at the top or bottom of the ordering table Bulk delete: Delete the selected Content Items			
Create Content	Create a content item. When you select this, you will be asked to choose a Content Type to add the content to. See this article on creating Content for more detail on this.			
Below Content Table				
Delete	Delete the current Section			
Cancel	Return to Site Structure without saving changes. Changes to ordering are saved as they are made.			
Save Changes	Save changes and return to Site Structure.			

The **Content Table** features the following column names:

Item	Description	
Order	Dragging the cross icon will change the order of a Content Item. This icon is not displayed for content that is automatically ordered, except for content that is locked to the top or bottom.	
Name	The name of the Content Item	
Version	The version number of the Content Item. Each time you make and save an edit to a Content Item a version is created. This allows you to view and compare older versions of Content Items.	
Status	 Draft - this is the status given to a Content Item you have saved as Draft. The Content Item does not appear in the approval list. Approved - this is the status given to a Content Item after approval. Only approved content is published. Content Items in a pending Section do not publish. Pending - when the Content Item is added or edited, the status defaults to "Pending" until approval. Pending Content Items do not publish. A previously approved version will continue to publish until a new version is approved. Inactive - if a Content Item is marked for deletion, the status is set "Inactive". This Content Item also appears in the Recycle Content and where it can be permanently deleted by an Administrator. Approved/Expired, Pending/Expired, Inactive/Expired - if the expiry date set for the Content Item has lapsed and an Archive Section is not specified, the status is appended with "/Expired". The Content Item will not publish. If an Archive Section has been set, an expired Content Item will be moved into the Archive Section and the expiry date will be removed. In this case, the expired Content Item will display a status of either Approved, Pending or Inactive (without the "/Expired" append). This Content Item will still publish from the Archive Section. 	
Last modified	The date on which the Content Item was last modified.	
Publish date	If a <u>publish date</u> is set for the Content Item it is displayed.	
Lock status	Locks a Content Item's order, preventing it from being reordered. The position of each Content Item in the ordering is either locked or unlocked, determined by whether or not Automatic Ordering is enabled for the Section.	

To **edit a piece of Content,** click on the **Name** or, use the **Actions menu** to the right of the content and choose **Edit**.

After you select the Content Item to edit, the **Content tab** on the Content Item screen is displayed:

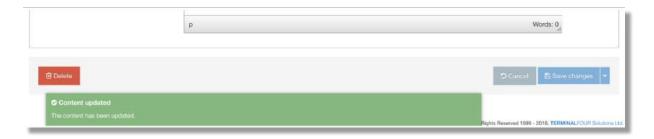


In this example, the component 'General Purpose Text', has **three Content Elements** (text can be edited in all three fields):

- Name: identifies the item in T4, appears on the list in the Content Table only
- **Title**: heading to introduce the paragraph on the page
- Content: an HTML field in which text can be formatted using the TinyMCE editor

One you've made your changes, click the appropriate <u>Save Changes option</u>. There are **four options** you can choose from when you have made your content edits.

When changes have been saved, you will see a **Content Updated** alert message:

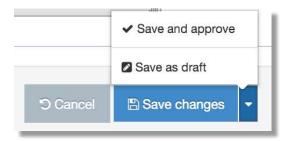


Use <u>Preview</u> to view how content will look before it has been approved, to check that the page will look as intended when it's published.

Save Content

When saving content there are **four different options** you can choose.

Use the **Save Changes button** at the bottom right of the component to choose 'Save Changes', 'Save and Approve' or 'Save as draft':



or use the **Publish button** located at the top right corner of the component to 'Save, approve and publish' as one action:



Option	Description
Save changes	Saves the content with a status of Pending . Content then appears in the approval list. The previously approved version of the content (if there is one) will be published until this content item is approved.
Save as draft	Saves the content with a status of Draft . You can keep working on the content without risk of it being published , as it does not appear in the approval queue. Until it is approved, the previously approved version of the content (if there is one) will be published.
Save and approve	Saves and approves the content with a status of Approved . This button will only appear if automatic approval is configured for the user level.
Publish now	Saves, approves and publishes the content with a status of Approved . This button will only appear if Publish Now is enabled and automatic approval and Publish Now are configured for the user level.

Create Content – add new content to a section

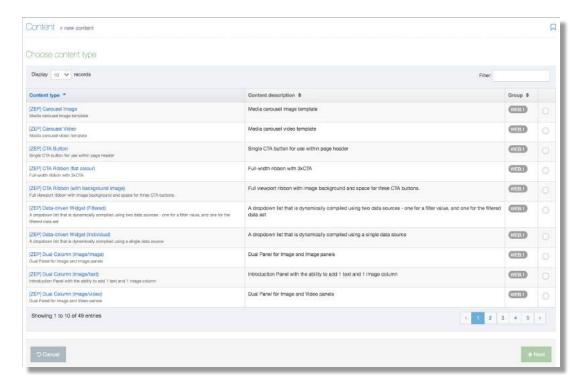
You can choose to create content from the Content menu item in the sidebar or **select a Section** from the **Site Structure** and create content from there.

Create Content from the Site Structure

First, locate the Section that you are going to add content to. From the **Section Actions** menu select **Create Content**:



Then **choose a Content Type** to contain your new content. You will only see Content Types that have been assigned to this Site or Section:



Find the content type (you can use the Filter to search) and click on the name.

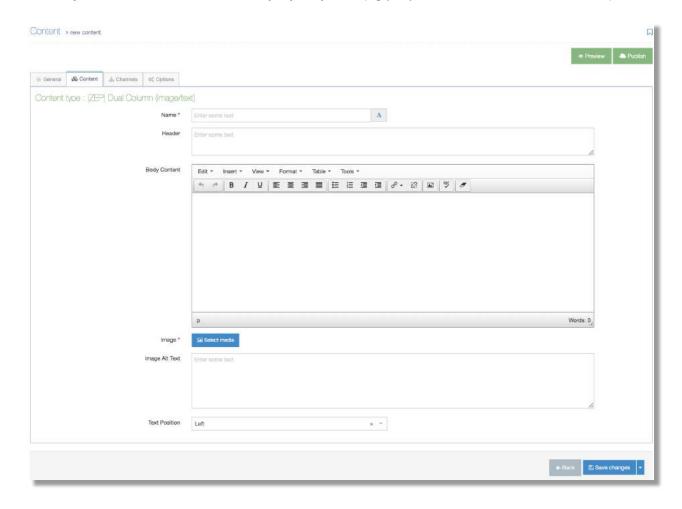
Content Tab: Add Content Details to your Content Type/Component

When a Content Type is selected, you are directed to the **Content tab** into which you can begin adding content. The Content fields you will see are determined by the Content Type.

Each Content Item has a **Name** which is **used to describe the content** (this name will appear on the list in the Content Table only).

All **fields marked with a red asterisk** (*) are mandatory.

Hover your mouse over a field **to display help text** (eg purpose of field, number of words).

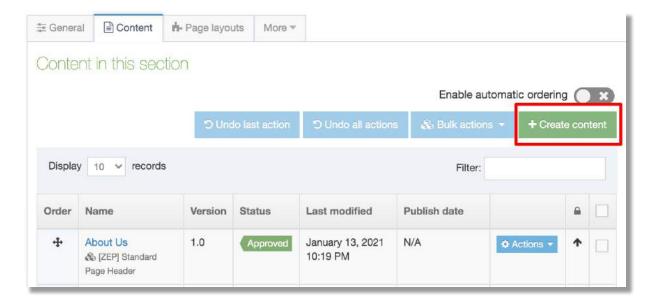


Add content to your component then use the **Save Changes** options to save your content.

The new component is **added to the Content Table** and will appear as **the last item on the list**.

You can continue to add content to your section from within the Content Table.

Use the Create Content button to select a new content type:



Order Content

New content added to the Content Table will appear as the last item on the list.

This order can be changed manually by clicking and dragging the cross icon in the Order column on the left:



Use **Preview** to **view how content will look before it has been approved**, to check that the page will look as intended when it's published.

Hyperlinks

A 'link is a promise'.

"The words in a link label make a strong suggestion about the page that is being linked to.

The destination page should fulfil what the anchor text promises."

NN/g https://www.nngroup.com/articles/link-promise/

Link text should be **descriptive of the content you're linking to** so the user has an idea of where they will be taken. Phrases such as 'click here' or 'download' are unhelpful and not accessible.

Link text should be short phrases – don't link entire sentences.

Generic phrases hinder search engine optimisation (SEO). Search engines, like users, take notice of link text. It's important that **link text contains keywords** and phrases that you want to rank highly for.

Links should always **open in the same browser** tab/window. The users can decide whether they want to open a new tab/window.

Links must work. Check links regularly to make sure they work. Broken links damage your credibility to users and won't help search engine optimisation.

Useful information

You'll find lots of general information on the Student Homepage.

Visit our documents and links page for the following:

- student handbooks
- forms
- useful documents and links

This is hosted on the internal website and a university login is required to view this page.

Types of Hyperlink

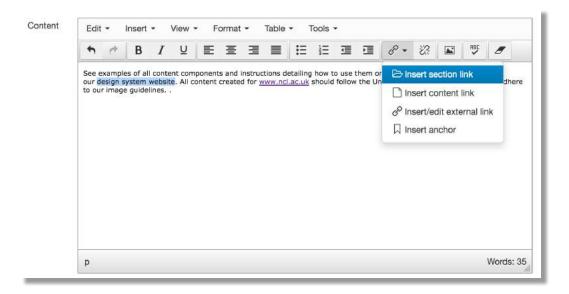
There are a several different link formats in T4:

- Section link to another section (page) within your site
- Content link to a specific component within a section on your site
- External include a link to a page that sits outside of your site
- Relative where a component doesn't allow for a section link, manually input a URL to link to a section within the site

How to apply a link to content

In a **Content' field** the content editor tool bar contains the 'link tool' drop down.

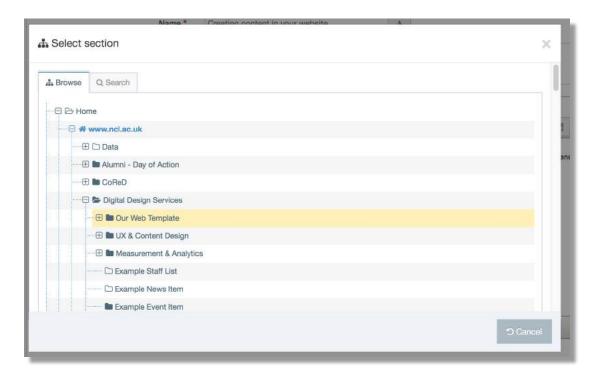
Highlight your content then choose a tool to link to another 'section' of your site, link to a piece of content within a section, or to link to a page which sits outside of your site:



Section link

Highlight your content then use the Link tool to select Insert Section Link.

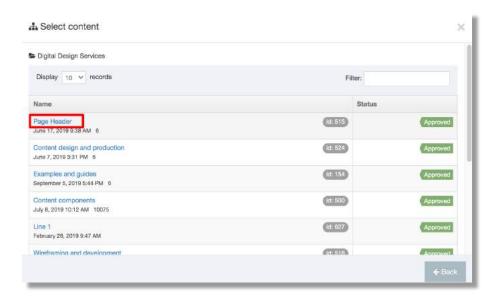
In the 'Select Section' pop-up window 'expand' the section www.ncl.ac.uk, then browse the T4 Site Structure and 'click' the name of the Section to be linked to. This action applies the link to your content:



Content link

Highlight your content then use the Link tool to select Insert Content Link.

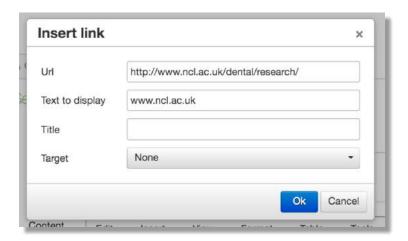
Browse the Site Structure, find and click the name of the Section which contains the piece of content to link to. Click the name of the piece of content to be linked to. This action will apply a link to the content in the page:



External link

To create a **link to a page which sites outside of your site** 'highlight your content' then from the tool bar select **Insert/edit external link**.

Add the full URL to the link field then **click OK** to apply the link to content:



Link a component to content

Most components contain Add section link and Add content link buttons, plus a Link to URL field.

Use the buttons to browse your Site Structure to **link to a section or piece of content**, or **add an external link using** the 'Link to URL' field:



Manual link

If the **component doesn't** contain buttons for 'Add section link' and 'Add content link', **a manual input field** will be used instead:



Where **the only option** to link to a section within your site is **to manually input a URL**, you must **create a relative link**. This link can be added to the link field within the component.

To **form a relative link** to a page in your site 'remove' https://www.ncl.ac.uk/ from the beginning of the url, eg:

/dental/research/or/dental/research/environment/

To form a link to a page that sits outside of your site, add the full URL to the link field eg:

https://www.ncl.ac.uk/postgraduate/courses/degrees/archaeology-ma/

Media Library

The Media Library is **home to the Media Items (images and documents)** you will use in your content. Media Items can be:

- Images (.jpg, .png)
- documents (eg PDFs, Word documents)

Videos must be hosted on a platform such as YouTube or Vimeo. Video can be added to content using content types designed for this purpose.

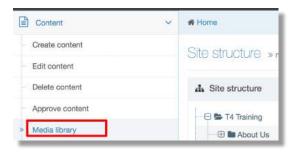
Before you add an item to the Media Library:

- crop and save images to dimensions specified for the particular Content Type see
 https://www.ncl.ac.uk/design-system/ux/images/sizes/
 Save image files as JPEG format
- save documents as PDF format
- optimise images and documents to keep file size below 500KB

The Media Library can be accessed from the Content menu, or directly from content if the component has a Media element.

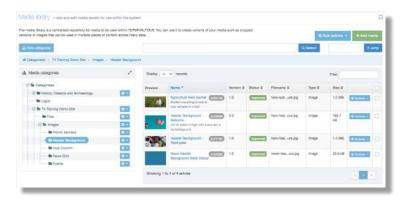
The Media Library is categorized to help you organize your Media Items. A **category named for your site** will contain sub-categories for 'Files' and 'Images'.

Using the Media Library



To access the Media Library, go to **Content > Media Library**.

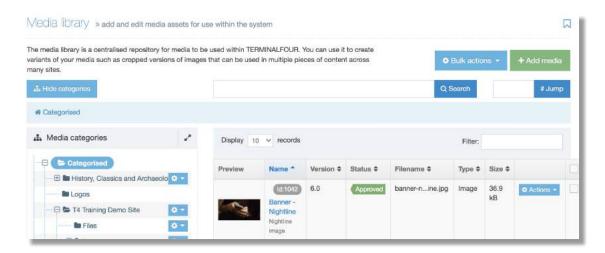
This screen appears:



Expand the 'Categorised' folder to view your site folder.

Media Library Controls

The Media Library controls let you add, move, delete and retrieve media items.



- 1. **Search**: To locate Media Items, enter the Media Item name or the keywords associated with it in the Search box and click Search.
- 2. **Jump**: Each Media Item has a unique ID number associated with it. If you have the ID for the Media Item, enter it into the Jump box and select Jump.
- 3. **Bulk actions**: Delete or move multiple files to a different Category. You must select two or more items' checkboxes to use the Bulk actions.
- 4. Add Media: Create new media within the currently selected Category.
- 5. Use the drop-down menu next to the folder to **Create**, **Edit** or Delete Category.

Media Items

Media Items are listed in a table.

To increase the number of items listed use the records dropdown options on the top right.

To quickly search through items in the selected Category you can **enter text in the Filter** input on the top right:

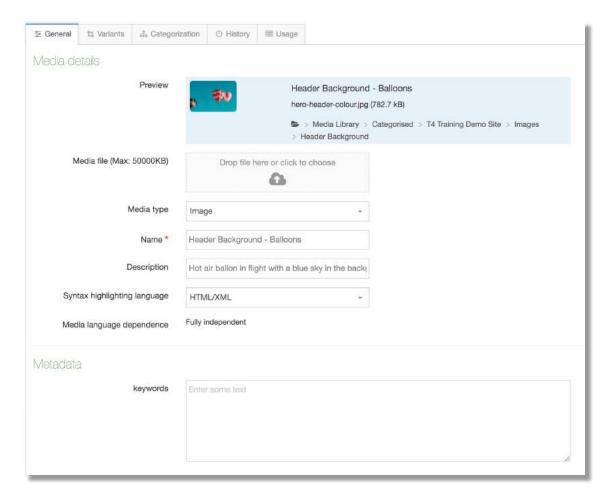


Add a Media Item to the Library

Browse to your Media Library folder, **expand the structure** and **select the destination folder** for the 'Image' or 'File'. Click the **Add Med**ia button:



Add the image or document file and details to the Media Details field:



- Media file field: drag and drop a file or click to choose a file from your desktop.
- Name (image): identifies the item in T4 eg, Header Background Balloons
- Name (Document) the Name you add here becomes the link text for the document
- Description: describe what is happening in the image (not required for documents)

Click **Save Changes** to add the item to the Media Library.

Images – add an image to a Content Type

You can add an image to your content using any Content Type/Component that has a Media element included. This Media Element enables you to browse your Media Library folder to select an image. Many of our components have a media element, eg:

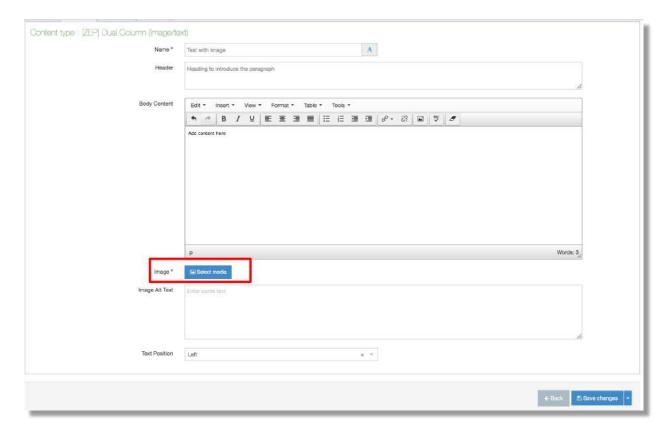
- Dual Column (image/text)
- Single Image
- Promotional Banner

Before adding the image to your component, make sure the image is cropped to the correct dimensions for the component used. See the image sizes table at:

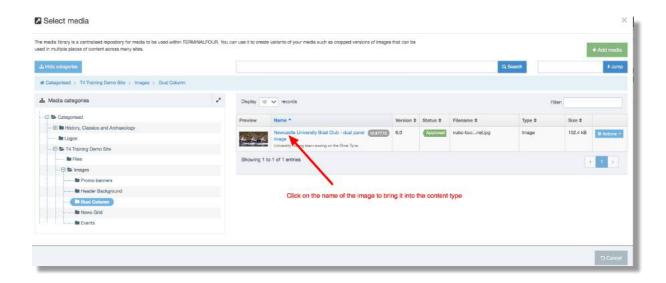
https://www.ncl.ac.uk/design-system/ux/images/sizes/

To add an image to content:

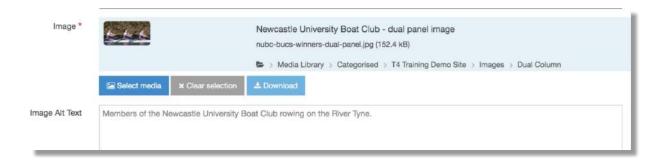
1. **Choose your content type**, give it a name and add content as required.



2. Locate the image field and click **Select Media** (this opens a Select Media screen):



3. **Browse** your Library folder to **find the image** and **click the name**. A thumbnail of the image and the file path for the item will appear in the content type:



- 4. Image Alt Text: add a description to tell the user what's happening in the image. Alt Text is used by Screen Readers to inform visually impaired users about the content of the image.
- 5. Save changes then Preview your content.

Documents – add a document link to content

You can **upload a document** to the Media Library and **link to it from content**.

Before adding a document to content **do**:

- **present content as a web page** and not a document if it's information that users should be able to easily access/search for
- save documents in PDF format for upload to the library
- optimise documents to reduce file size to under 500KB where possible
- remember that the maximum file size for upload to Media Library is 8MB

Document **link text** should **provide the title of the document** to be downloaded, and **indicate the file type and size**. Follow the best practice format below:

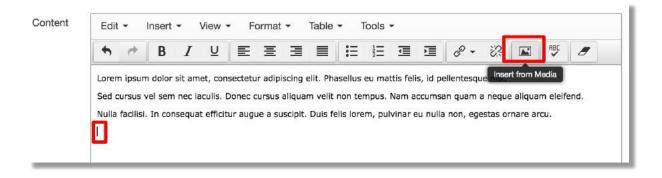


The Name you give to the document asset in the Media Library creates the link text which will display in your content.

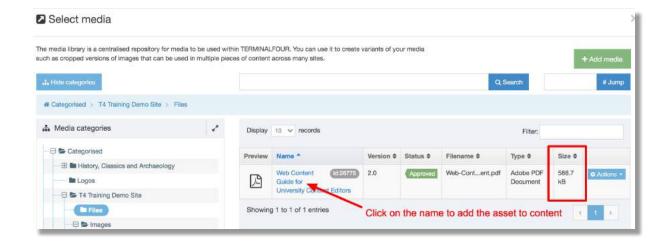
You'll see the file size of your document displayed in the Media table.

To add a document link to content:

1. Find and **Edit** your content:



- 2. In the **Content edit field** place the cursor where you want the document link to appear.
- 3. Click **the Insert from Media** icon found in the toolbar (opens a Select Media screen)
- 4. Browse to your Media Library Files folder, find the document in the Media Table
- 5. Make a note of the file size then click the name:



6. The document name appears as link text in the Content field:



- 7. Add the document type and file size after the link text, eg (PDF: 500K
- 8. **Save Changes**, then **Preview** the page and to check the link.

Replace Media – upload a new file to the existing asset

You can replace/update an existing Media library asset, perhaps to add a re-crop of an image or to upload the latest version of a PDF.

To replace an asset (image or document):

- 1. find the asset in the Media Library and click the name
- 2. drag-and-drop or browse to upload the new item
- 3. Save Changes

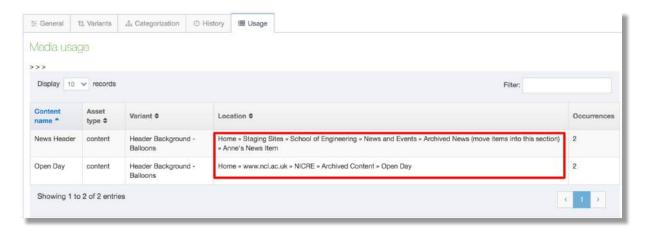
When content is re-published the **new image or document** will appear in your page.

Delete media (non-recoverable)

You can Delete an asset from the Media Library but **once deleted the item can't be reinstated**.

Before you delete an asset check the Usage tab to see if the item is linked to content.

Click the asset **Name** then find the **Usage tab.** The **Location column** will list all sections where the asset is currently used:



If **the asset is in use** deleting it will remove content from your live pages. Consider replacing the asset with something else before removing it from the library.

To **delete an asset,** find it in the **Media Table** and use the **Actions menu** to select **Delete**. The item status will change to **Inactive**:



Inactive <u>items are removed</u> from your site by our T4 Administrator. This is done every **Tuesday between 08.00 and 10.00**.

Publishing Content –T4 V8 Automated Publish

The automated system publish finds and publishes all content which has been 'Approved'.

The automated publish helps T4 processes to run smoothly:

- system publish occurs twice a day at 14.00 and 02.00
- it takes 1hour 30 minutes to complete
- approved content will be visible on the website when publish has finished

Publish now

Publishing content 'on demand' can make the CMS run more slowly. You may not be the only editor sending content to publish 'straight away.

Use 'Publish Now' **only when there's an immediate business need** to publish content changes outside of the automated publish.

To publish a piece of content straight away, edit the component and click the **Publish** button.

To **publish a whole section**, locate the section in the **Site Structure** then from the **Action menu** to select **Publish Section**.

Please allow a few minutes for content updates to appear in your live page.

Browser refresh

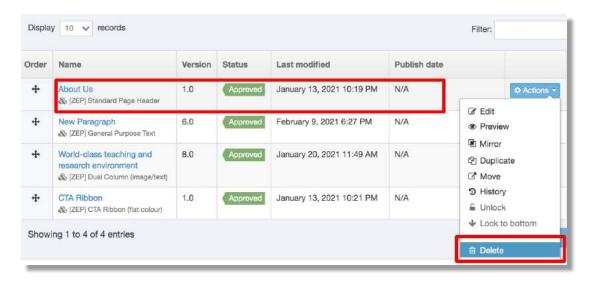
If content updates don't appear, try CONTROL+F5 to refresh your browser view.

Delete content

When you delete content in Terminalfour, you do not remove it from the system immediately.

- When a piece of content or a section is marked for deletion its status changes to Inactive. On the 'next system publish' Inactive content or sections are removed from the live website.
- The T4 Administrator must then purge the content in T4 before it actually disappears from the system (see <u>Removal of Inactive Content and Sections</u>). Once purged, the content and its history are removed from the system.

To delete a piece of content, go to the **Section** and use the **Action Menu** to select **Edit Content**. Locate the content type and use the Action menu to select Delete:



The content status will change to Inactive:

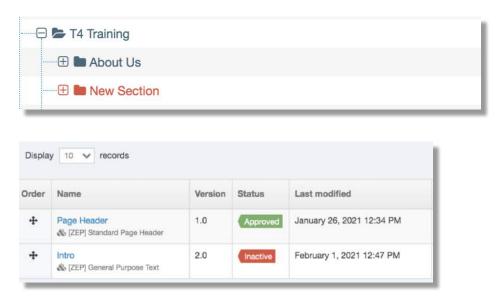


To delete a Section (page) go to the **Site Structure** and use the **Actions menu** to select **Delete Section**. The section status changes to Inactive and the colour of the section in the Site Structure changes to 'red'.

Inactive Content and Sections

Content and sections marked as 'Inactive' will be regularly removed from your site.

This is done by our T4 Administrator every Tuesday between 08.00 and 10.00.



Recycled Content Area

Content Items, Sections, or Categories marked as 'Inactive', are stored in a **Recycle Content area** and remain there until the Administrator takes action to purge them.

When Content Items and Sections are purged from the Recycle Content area they are deleted permanently and cannot be recovered.

If Sections and Content Items have not been purged, you can restore Sections and content to "Approved" status.

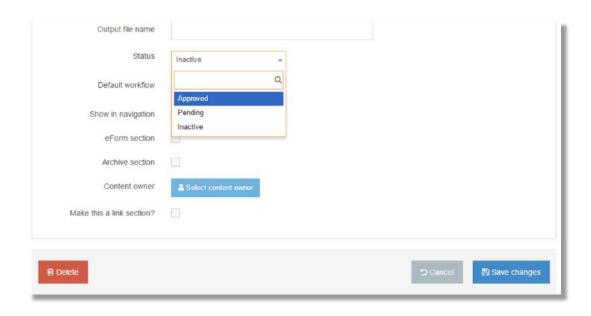
Change status of Sections and Content

You can **change the status of deleted/inactive Sections and Content items** back to 'Approved'. Media Items cannot be restored.

To change the status of a Section, go to the Site Structure, and use the Actions menu to Edit Section:



In the General tab, change the status from **Inactive** to either **Approved** or **Pending** then **Save changes:**



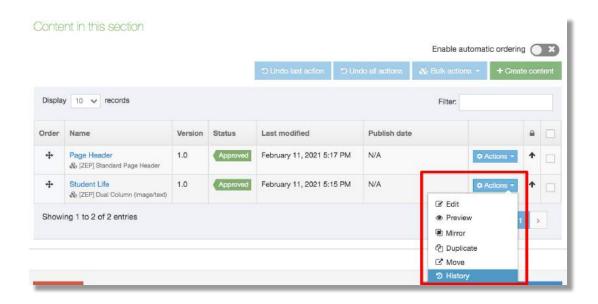
To change the status of a piece of content, find and then Edit content. Choose Save Changes options to change the status to Pending or Approved.



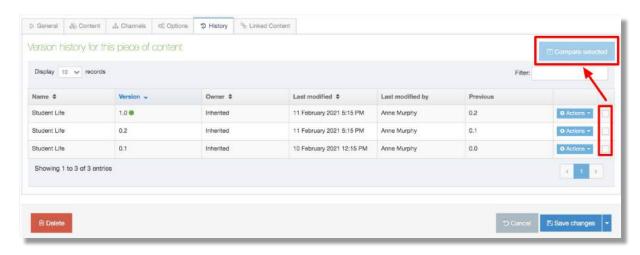
History

TERMINALFOUR keeps a history of all versions of content created. This enables you to view all items saved in History, compare versions, and revert to a previous version at any stage if needed.

Select the **History tab** from the **Content Item screen**:



This opens the Version history screen:

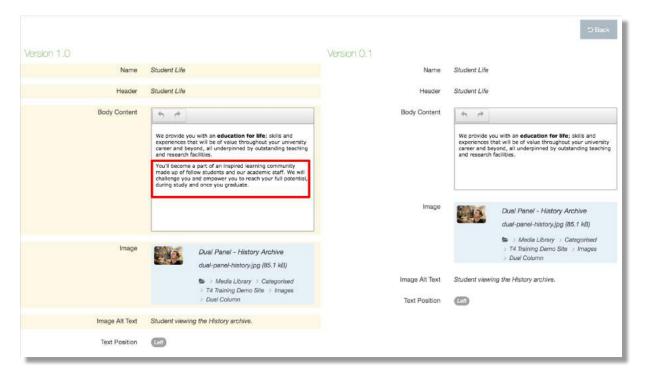


Comparing Content

In the last column are checkboxes (highlighted above).

To compare content, select **two checkboxes.** When two versions are checked **the Compare Selected button is activated**. You can only compare two items of content at a time.

This screen appears:



After you compare content, click the Back button to return to the History tab.

Archive a Section (remove section from the live site)

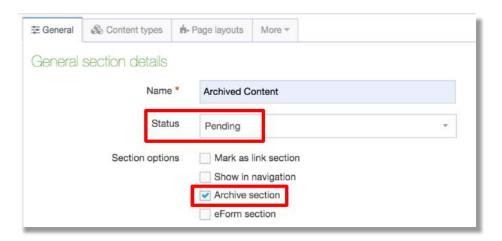
You can temporarily **remove a published section from your site** and **retain it in T4**. The section can be reinstated to the live site when required.

An **Archived Content section** is used to 'hide' sections or content from the Site Structure and therefore the published site.

Sections moved into the Archived Content folder are **removed from the live site at the next automated system publish**.

You'll find the Archived Content section on your **Site Structure**. If your site doesn't have an Archived Content section, you can **create one**:

1. Find the site **Homepage** in the Site Structure. Use the **Actions Menu** to select **Create Section**.



- 2. In the General Tab:
 - Name the section: Archived Content
 - Set section 'Status' as Pending
 - Uncheck 'show in navigation'
 - Check **Archive section** (sets the section to not publish by default)
- 3. Click **Save Changes** to add the archive section to the Site Structure:



Move Section

Use the **Action Menu** to **Move section** to the Archive folder, or from the Archive and back into the Site Structure.