

UNIVERSITY OF WASHINGTON BOTHELL

Content Management System

Documentation

Information Technology

2009

CMS or Content Management System, is a web editing tool configured to manage the University of Washington Bothell campus website. The purpose of CMS is to simplify the process of creating and maintaining existing Web pages.

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Overview

Kentico CMS Overview

Kentico CMS is software that allows a person without any programming knowledge to create a powerful dynamic website.

By using Kentico CMS, you will be able to manage and edit the content of your website in a quick, efficient and professional manner. If you need additional assistance please contact Information Technologies (IT) at 425.352.3456 or email It@uwb.edu

What is CMS

CMS (Content Management System) is a web editing tool configured to manage the University of Washington Bothell campus website. The purpose of CMS is to simplify the process of creating and maintaining existing web pages. Using CMS, UW Bothell departments can edit their content online, rather than submitting web page requests to Web Services. Departmental web editors can make immediate changes to their website, by adding content, selecting a predefined design, and customizing its visual appearance.

Signing in

Getting CMS Account

New Editor: If you are a new editor and you have a UWB account, you will need to contact Information Technologies (IT) at 425.352.3456 or email It@uwb.edu to request access.

An Existing Editor: Your account will be automatically transferred from Bricolage CMS to Kentico CMS. If your access level changed during the CMS transition, please contact us at it@uwb.edu, and we will investigate the change.

Login

To access the Content Management System you will have to log on using your UWB credentials. (See Figure 1: Log on window of CMS)

1. Open your favorite browser
2. Go to: <http://edit.uwb.edu>
3. Enter your UWB credentials
4. On the User Name field: Enter your Full UWB email address
5. On Password field: Enter your UWB password
6. Click on "Log On"

The Figure below illustrate the log on process

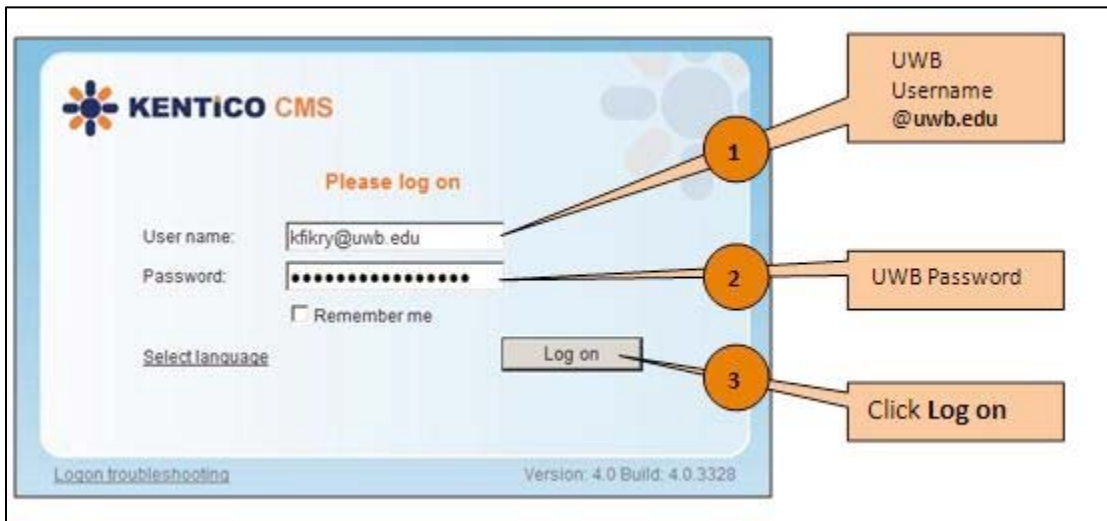


Figure 1: Log on window of CMS

User Interface Overview

The user interface of Kentico CMS consists of several sections. Each section has its specific functionality and its logical relation to the others.

Content:

Kentico CMS adopts a user-friendly interface, similar to Microsoft Windows that aids use and understanding of the system. The user interface consists of several sections depicted in the illustration below. (See Figure 2: Content Management User Interface).

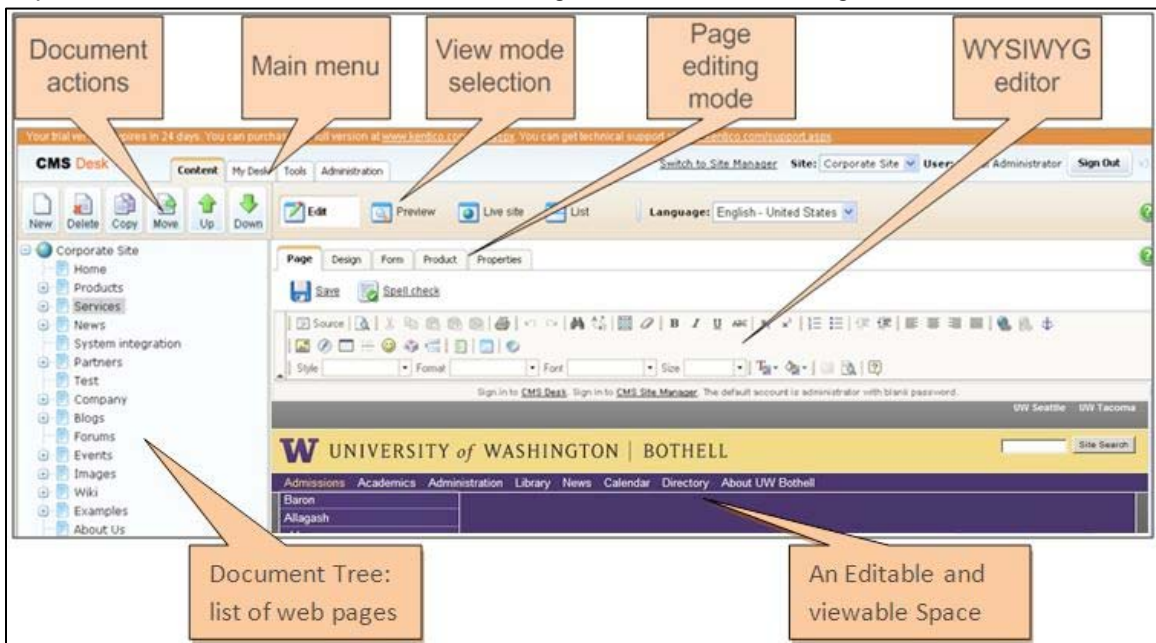


Figure 2: Content Management User Interface

The Main Selections are:

Document Actions toolbar where you can create, delete, edit, copy, or move documents. (See Figure 3: Document Actions)



Figure 3: Document Actions

Main Menu is where you can switch between the Content, My Desk, and Tools sections. (See Figure 4: Main Menu)



Figure 4: Main Menu

View Mode selection allows you to choose between editing, preview, live view, and list view depending on whether you want to edit content of your website or just see how it will look like in the live browser. (See Figure 5: View Mode)

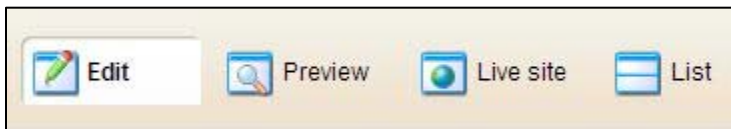


Figure 5: View Mode

Page Editing Mode is where you can choose the way you want to edit the content of the checked-in page. You can choose from editing page content, document fields (Form) or document properties. (See Figure 6: Page Editing Mode)

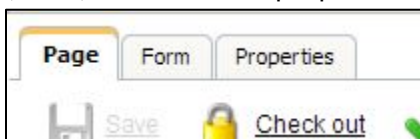


Figure 6: Page Editing Mode

Document tree displays the structure of your web site and allows you to organize documents in it. (See Figure 7: Document Tree)

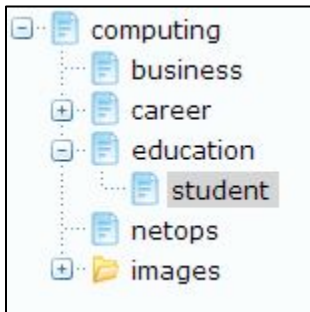


Figure 7: Document Tree

Note: All names are lower case, short, and one word as they form the URL used to access the web page.

Editing/viewing space is the mode selected when editing content selection of the web page. (See Figure 8: Editable and Viewing Space)

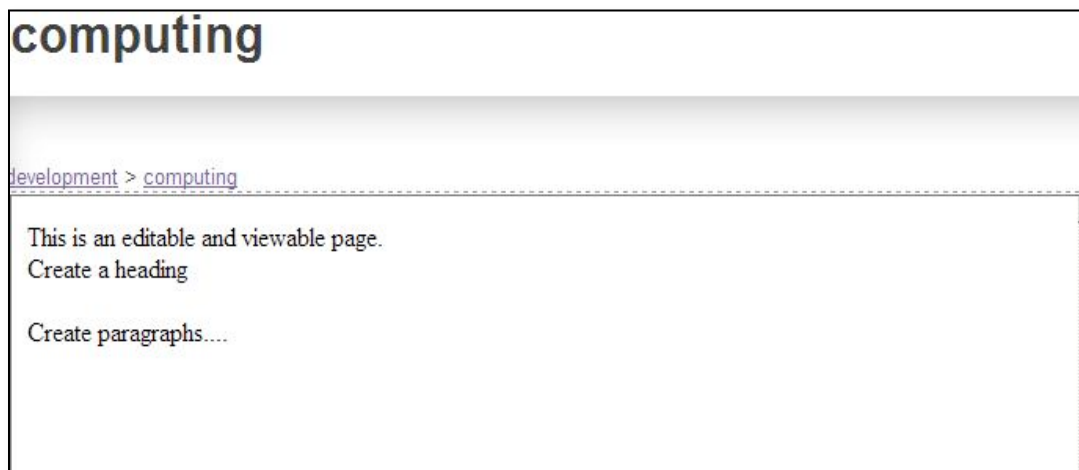


Figure 8: Editable and Viewing Space

Managing my Profile

My Desk:

My desk will provide you with the functionalities that will enable you to manage your profile and your recent activities. For instance, in My Desk, you will be able to view your recent documents, documents checked out by you, or documents waiting for your approval. See (Figure 9: My Desk)

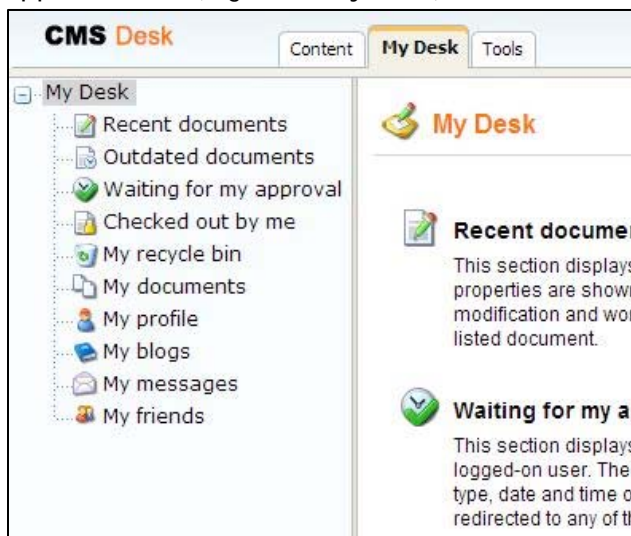


Figure 9: My Desk

Recent Documents

This section displays a list of recently modified documents. The following properties are shown for each document: name, type, date, time of last modification, and workflow step. You can choose to be directed to any of the listed documents by clicking on the underlined document names. (See Figure 10: Recent Document)

Document name	Type	Modified	Workflow step
education	Story	7/7/2009 12:46:58 PM	Published
student	Story	7/7/2009 12:42:47 PM	Published
computing	Cover	7/7/2009 12:20:25 PM	Edit
student	Story	7/7/2009 12:14:43 PM	Edit
business	Story	7/7/2009 12:02:29 PM	Edit
career	Story	7/7/2009 11:59:39 AM	Edit
Baron	Story	7/7/2009 10:25:59 AM	Edit

Figure 10: Recent Document

Outdated Documents

This section displays a list of documents older than a specified date. The following properties are shown for each document: name, type, date and time of last modification, and workflow step. You can choose to be directed to any of the listed document by clicking on the underlined link. (See Figure 11: Outdated Documents)

Document name	Type	Modified	Workflow step
business	Story	7/7/2009 12:02:29 PM	Edit
career	Story	7/7/2009 11:59:39 AM	Edit
computing	Cover	7/7/2009 12:20:25 PM	Edit
education	Story	7/7/2009 12:46:58 PM	Published
student	Story	7/7/2009 12:14:43 PM	Edit
student	Story	7/7/2009 1:56:55 PM	Edit

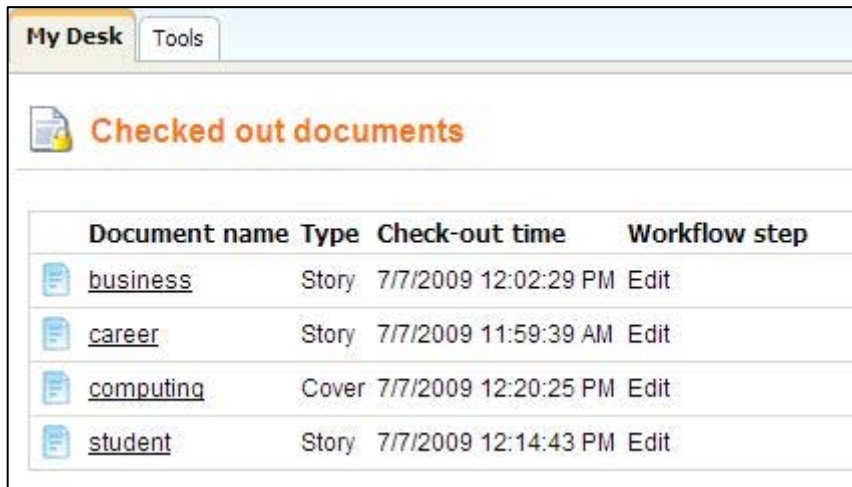
Figure 11: Outdated Documents

Waiting for my Approval

This section displays a list of documents waiting for your approval. This feature is often used when the primary editor needs to approve or review content before it gets published. The following properties are shown for each document: name, type, date and time of modification and workflow step. You can choose to be directed to any of the listed document.

Checked Out by Me

This section displays a list of documents, which have been checked out by the logged-on user. The following properties are shown for each document: name, type, date and time of check-out, and workflow step. You can choose to be directed to any of the listed documents by clicking on the underlined link or document name.



The screenshot shows a web interface with a 'My Desk' header and a 'Tools' button. Below the header, there is a section titled 'Checked out documents' with a document icon. A table lists four documents with their names underlined, types, check-out times, and workflow steps.

Document name	Type	Check-out time	Workflow step
business	Story	7/7/2009 12:02:29 PM	Edit
career	Story	7/7/2009 11:59:39 AM	Edit
computing	Cover	7/7/2009 12:20:25 PM	Edit
student	Story	7/7/2009 12:14:43 PM	Edit

Figure 12: Checked Out by Me

NOTE: Check in all documents that you are not actively editing so other editors can access them.

My Recycle Bin

This section displays a list of documents which have been deleted from the given site. You can choose to view, restore, or destroy any of the documents. The recycle bin works the same as the recycle bin in Microsoft Windows. Documents will be added to this section when they are deleted but not destroyed. If you destroy a document from the recycle bin, it **CANNOT BE RECOVERED**, so use caution when destroying documents.

My documents

This section displays a list of documents, owned by the logged-on user. The following properties are shown for each document: name, type, date and time of last modification, and workflow step. You can choose to be directed to any of the listed documents by clicking on the underlined link or document name.

My documents			
Document name	Type	Modified	Workflow step
business	Story	7/7/2009 12:02:29 PM	Edit
career	Story	7/7/2009 11:59:39 AM	Edit
education	Story	7/7/2009 12:46:58 PM	Published
student	Story	7/7/2009 12:14:43 PM	Edit
student	Story	7/7/2009 1:56:55 PM	Edit

Figure 13: My Documents

[My Profile/ My Blogs/ My Messages My Friends](#)

These sections are currently unavailable.

Getting Started

Locating Existing Web Pages

To locate an existing document, you can search using the URL, document name, or the document title.

1. Under the Document tree, click on **Search** (See Figure 14: Document Search Tree)

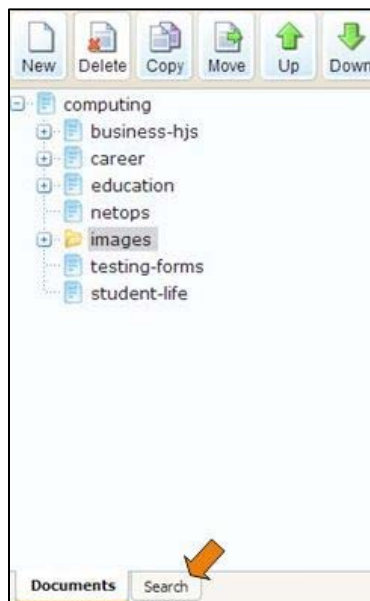


Figure 14: Document Search Tree

2. Type the page name on the search field, then click search. (See Figure 15)



Figure 15: Search filled

3. A list of documents containing the keyword “business” will show. (See Figure 16)

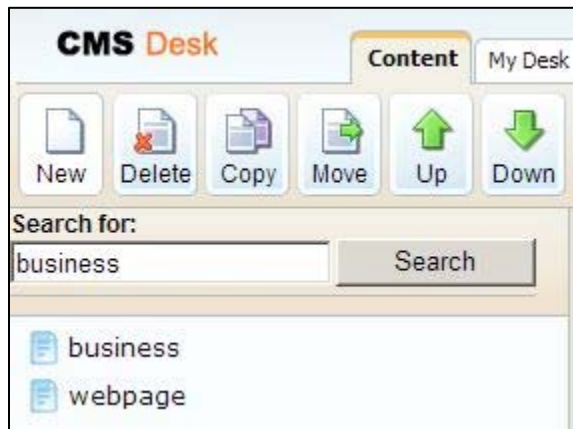


Figure 16: Search Result

4. Click on the document title you are searching for, and the page document will open under the page tab. (See Figure 17)

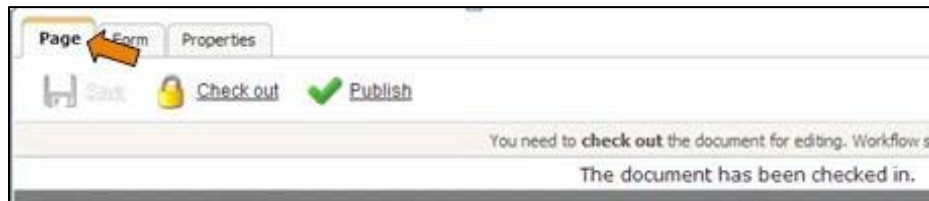


Figure 17: Page Tab

5. Check-out the page to edit. (See Figure 18: Check out the Page)

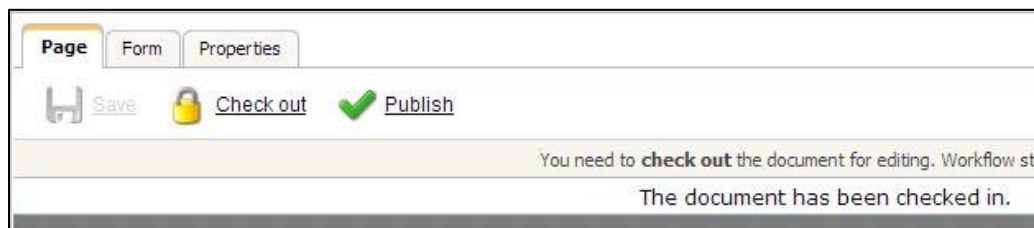


Figure 18: Check out the Page

Note: For instruction on how to edit documents using the editor, look at Using the Editor section)

Creating a new Web Page

1. In the Document Tree, select where you want your document to be located in the structure of your department website. (See Figure 19: Document Tree)

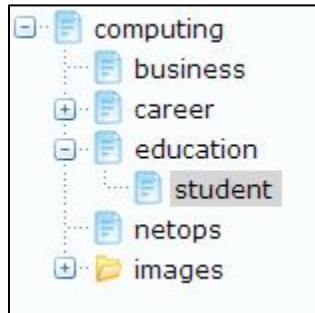


Figure 19: Document Tree

Note: Once you select a document from the document tree the new page will be created below the document you have just clicked on.

2. On the Document actions tab, click on **New**. (See Figure 20: Document Action)

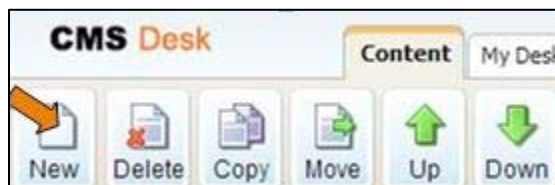


Figure 20: Document Action

3. Click on Standard. (See Figure 21: New Document)

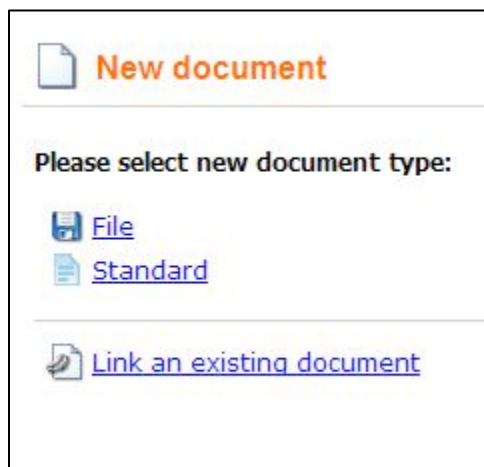


Figure 21: New Document

4. Select **Standard**, and choose your template. (See Figure 22: Template Window)

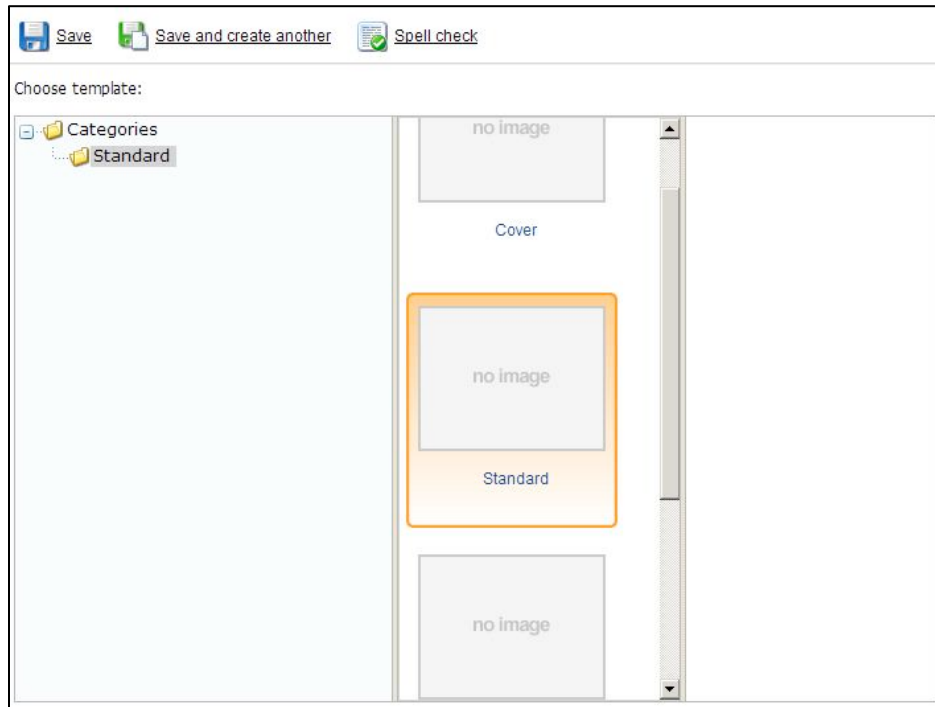


Figure 22: Template Window

- 5 Click on **Save**
- 6 In the following step, enter the name of your new document. (See Figure 23: New Document Naming)

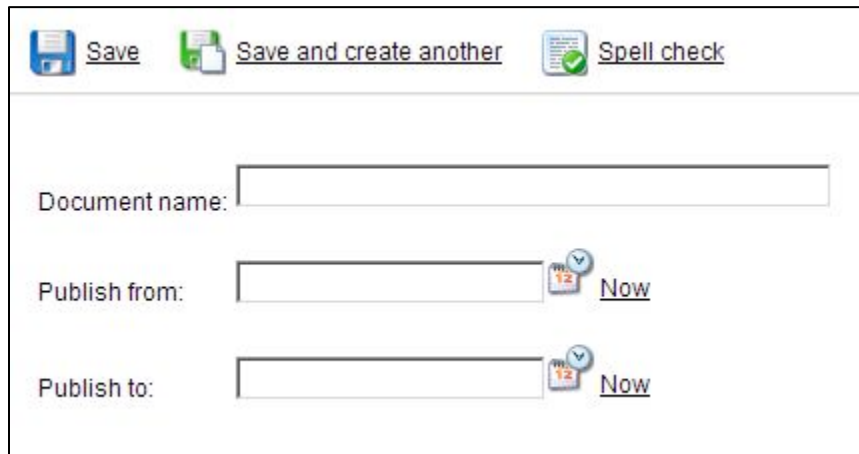


Figure 23: New Document Naming

- 7 Click on **Save**
- 8 Now, you will see your new document page added to the document tree under the already existing documents.
- 9 Note: On the document name field, please make sure to use a short, lowercase, and one word name. The name chosen will form the document's name and URL.

Editing the Content of the Document

Click on the area you would like to edit, and edit it using the editor. (See Figure 24: Editable Viewable space)

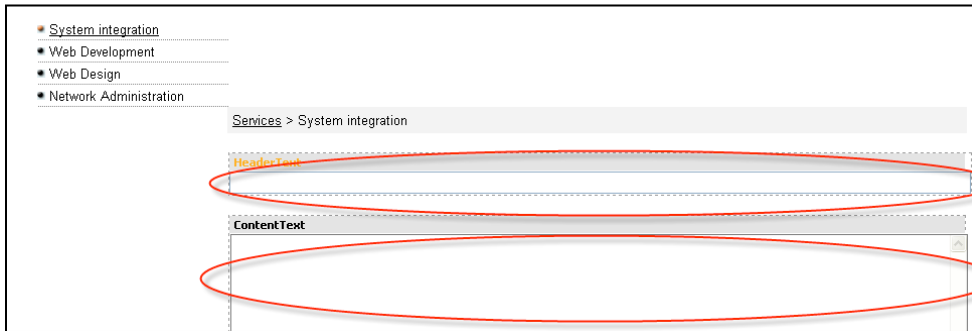


Figure 24: Editable Viewable space

Note: once you create a new page, it is automatically checked out under your name; please remember to check in the page once done so other editors can access it.

Using the Editor

Whether you are creating a new page or editing an existing page, the editor will provide you with all the tools needed to edit and add various contents to your page. The following section will provide you with instructions on how to use the editor for formatting text, and attaching images, forms, and videos.

Using the Editor

In Kentico CMS, you can use the editor to create web content without HTML knowledge. Its icons and functions are similar to Microsoft Word. (See Figure 25: Editor Tools)

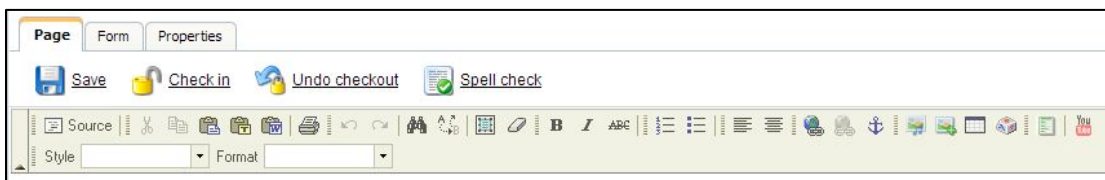


Figure 25: Editor Tools

Unlocking the Editor

To edit a page:

- 1 Locate or create the page that needs to be edited.

- 2 Once the page is located, checkout the page so you can edit it. (See Figure 26: Check out Page)



Figure 26: Check out Page

Note: When editing be sure to place your cursor in the text area to which you wish to edit.

Text Formatting and Editing Options

- ❖ Paste: Paste as is, Paste as a plain text, and Paste from word. (See Figure 27: Paste)

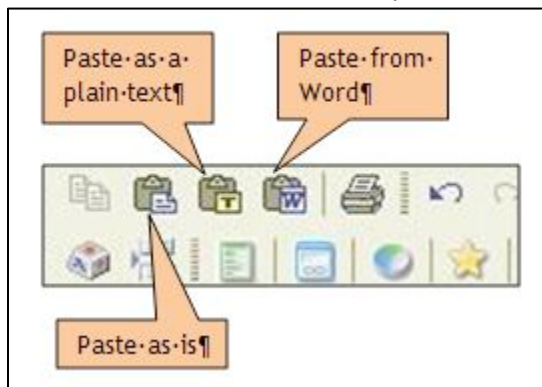


Figure 27: Paste

Note: To activate the paste option:

- 1 Copy text that you would like to paste
- 2 Click where you would like to paste the information
- 3 Then, click paste.

If the copied information is from word, select "Paste from Word". Once you click on Paste from Word icon, the editor will open a window where you can paste the information. (See Figure 28: Paste from Word)

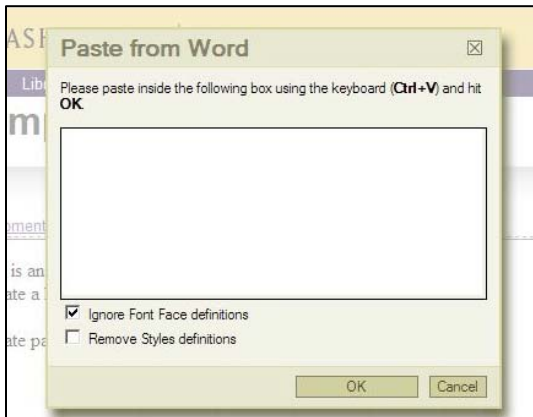


Figure 28: Paste from Word

❖ Print: To **print** the page content (only the editable area)



❖ Undo and Redo: to undo a content change, or redo content change.



❖ Find and Replace:



To find content:

- 1 click on Find icon
- 2 A dialog that has the option to find and replace will open.
- 3 To replace content, click on the replace tab. (See Figure 29: Find and Replace)



Figure 29: Find and Replace

❖ Select all and Remove Format:



❖ Fonts:



For a shortcut, you can use:

Ctrl + B : for Bold.

Ctrl + I : for Italic.

Ctrl + U: for Underline.

❖ List and Alignment:



❖ Insert/ Edit/ Remove link:



Highlight text that will become a hyperlink and select Insert/Edit Link icon. Once you click on Insert/Edit Link, the link window will open: (See Figure 30: Link windows)

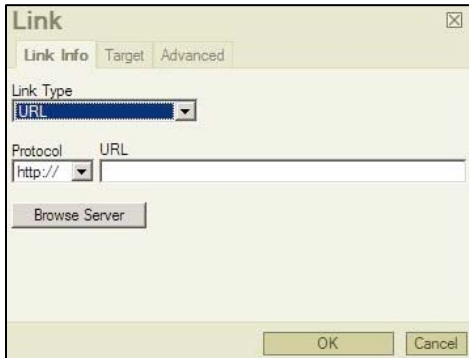


Figure 30: Link windows

You can choose the link type which can be either:

- URL
- Link to an Anchor in the text
- E-Mail

Example: On the URL field, type the command you would like to link to. For instance, you can select the mailto protocol and type: it@uwb.edu.

Media: Images, Videos, and Attachments

In CMS, Media refers to images, videos, word documents, PDFs, and etc...

Images and Attachments

CMS provides three ways of linking an image to a document:

1. Linking media using Attachments
2. Linking media from the Document Tree
3. Linking media from the editor
4. Linking media from the Media Library


To attach an image to a document, first you need to:

1. Locate the document to which you want to insert the picture.
2. Make sure that the page is checked out, and in the editing mode.
3. Place the cursor where you would like to insert the image.

Option 1: Linking Media using Attachments:

Attachments can be accessed from the editor, or from page properties.

- o Accessing attachments from the editor:

1. Click on the Insert/Edit image icon in the editor. 
2. The *Insert Image or Media* webpage dialog will appear. (See Figure 31: Media Dialog)

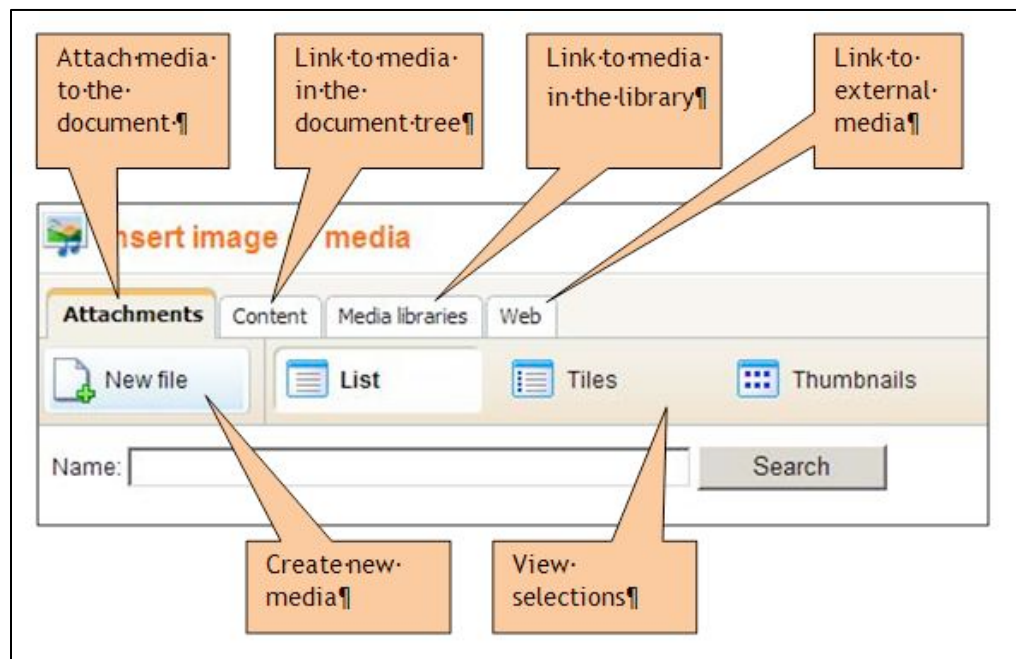


Figure 31: Media Dialog

3. Click on attachments
4. In the following dialog, you will be able to add a new file, or search for an existing one within the document.
Note: CMS provides three different view selections where you can preview your media before selecting it: List View, Titles View, and Thumbnails View.
5. Once you locate or upload your media, choose from the media tools to: preview, insert, delete, or edit the selected image. (See Figure 32: Media Option)



Figure 32: Media Option

6. If you double click on the image, an extended window that will provide you with advanced editing options will open. (See Figure 33: Image Advanced Options)

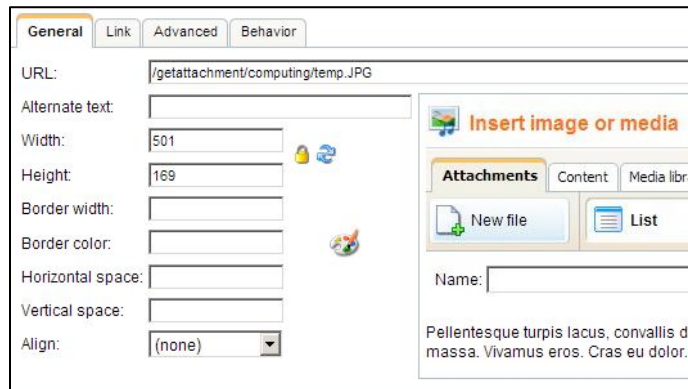


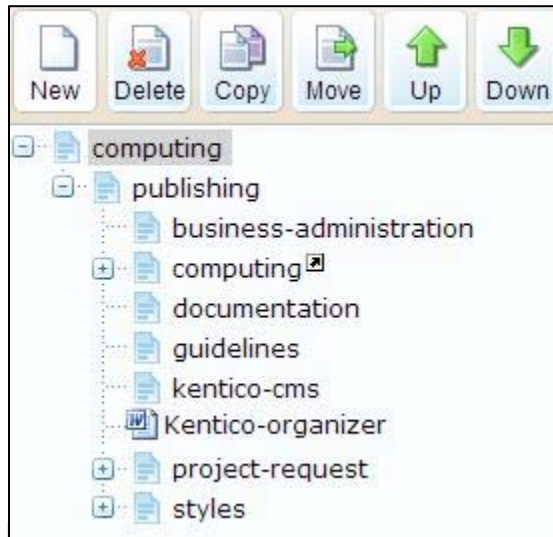
Figure 33: Image Advanced Options

7. Once done editing, or selecting your image, click on insert.

Note: For media that are added to the document through attachments, they will be automatically published when the document is published.

Option 2: Linking Media from the Document Tree

1. Under the Document Tree, select the page under which you would like to add a New File. (See Figure 34: Document Tree)



2. Right click on the document, and click on **New**.
3. Click on File for uploading an attachment from your local desktop.
4. Click on Save. (See Figure 35: Editing Media on the Document Tree)

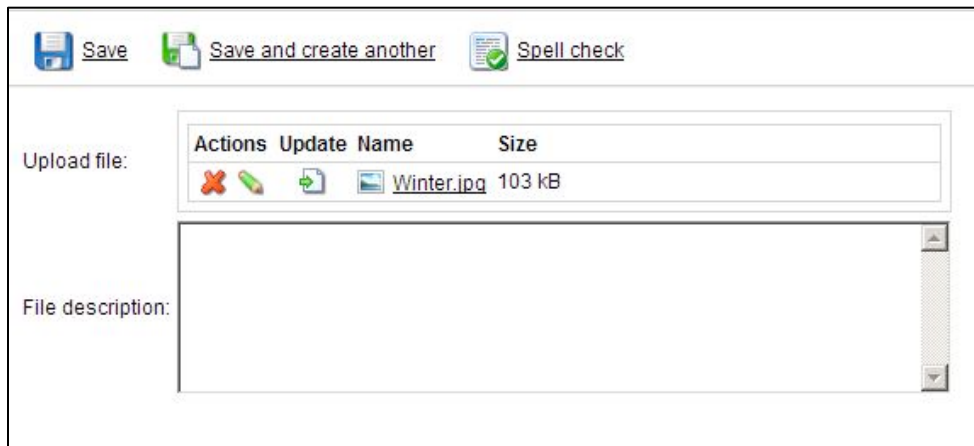
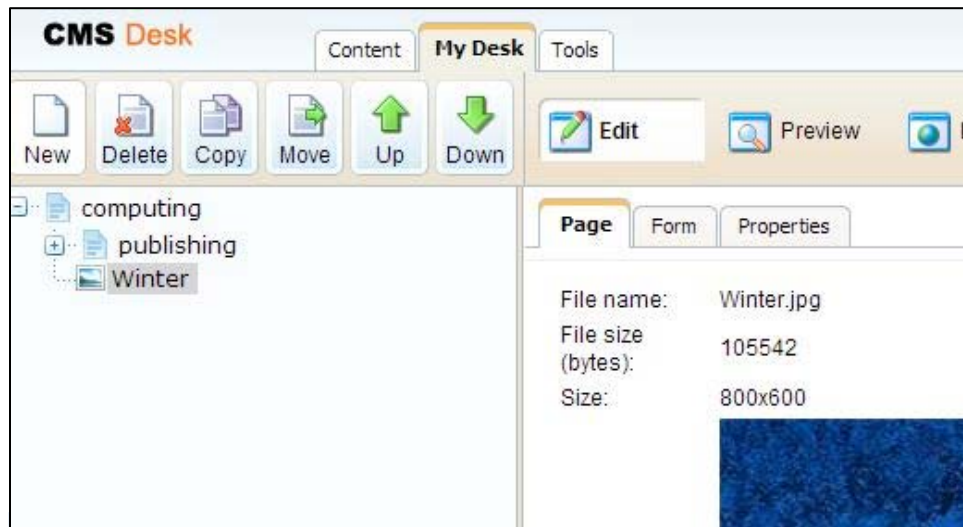


Figure 35: Editing Media on the Document Tree

5. Media will be added in the Document Tree under the selected folder. (See Figure 36: Media added to the Document Tree)



Note: For media that are added from the Document Tree, EACH LINKED MEDIA have to be PUBLISHED separately.

Document Tree content can also be accessed through the editor: (See Figure 37: Media Dialog)

- Once you click on the image icon in the editor, the insert media page will open.
- Click on the content tab, and select the document under which you would like to link media,
- Click on New File

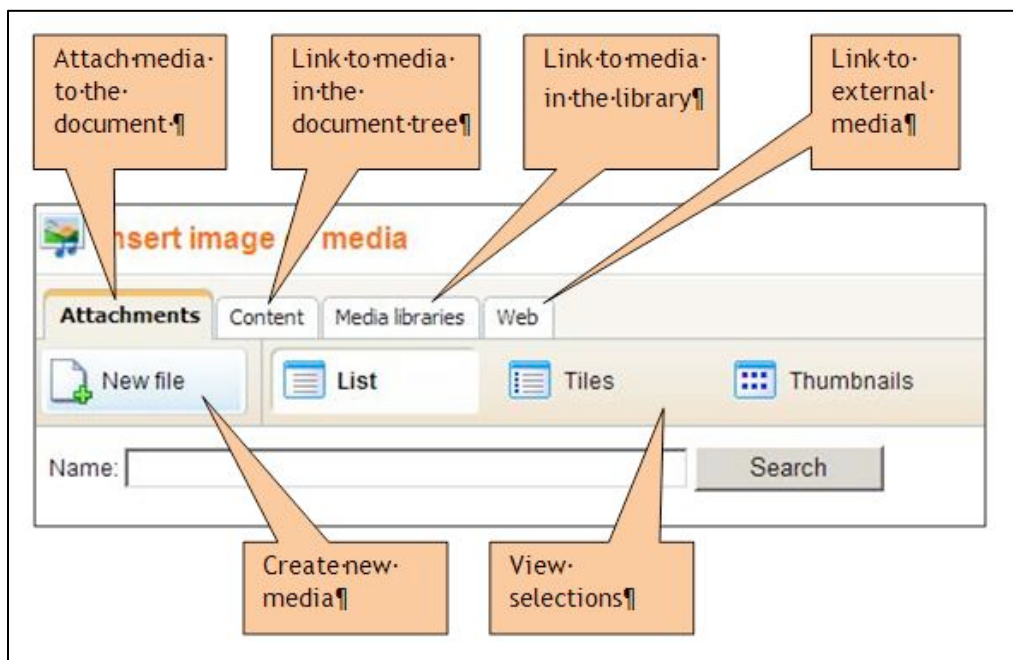


Figure 37: Media Dialog

Option 3: Linking Media from the Editor

1. Check out the document that needs to be edited, and click on the location where you would like to insert the media at.
2. On the editor, click on insert media icon.(See Figure 38: Editor)

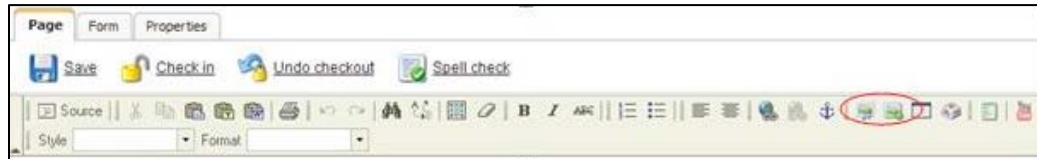


Figure 38: Editor

3. The image media webpage dialog will open. (See Figure 39: Image Media Dialog)

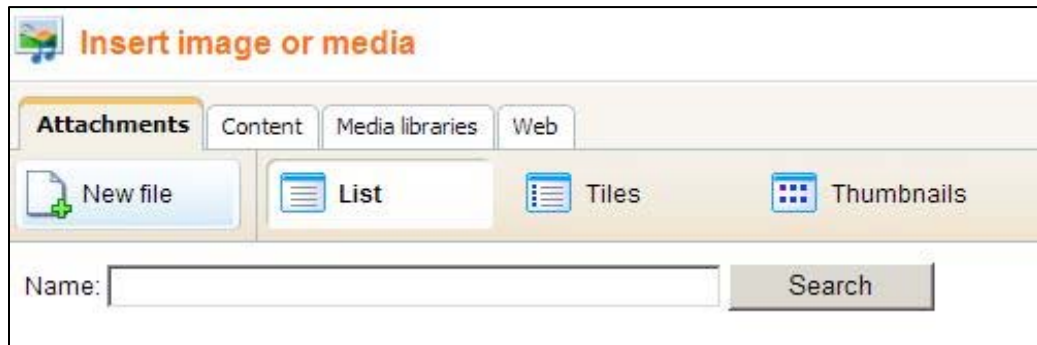


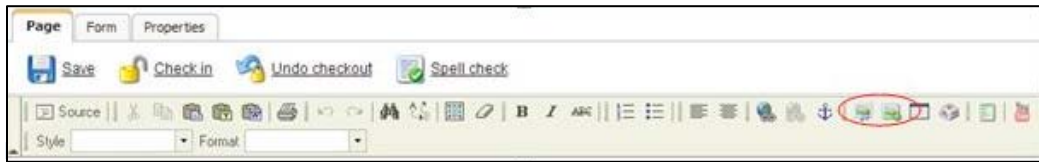
Figure 39: Image Media Dialog

On the image or media webpage dialog, you can:

- Link media from attachments, for instructions, see Media: Images, Videos, and Attachments, option 1)
- You can link media from Content, See Media: Images, Videos, and Attachments option 2.
- You can link Media using the Media library-Media library consists of non-editable pre-formatted pictures.
- You can link Media by referring to external sources.

Option 4: Linking media from the Media Library

1. Check out the document that needs to be edited, and click on the location where you would like to insert the media at.
2. On the editor, click on insert media icon.(See Figure 40: Editor)



3. The image media webpage dialog will open. (See Figure 39: Image Media Dialog)

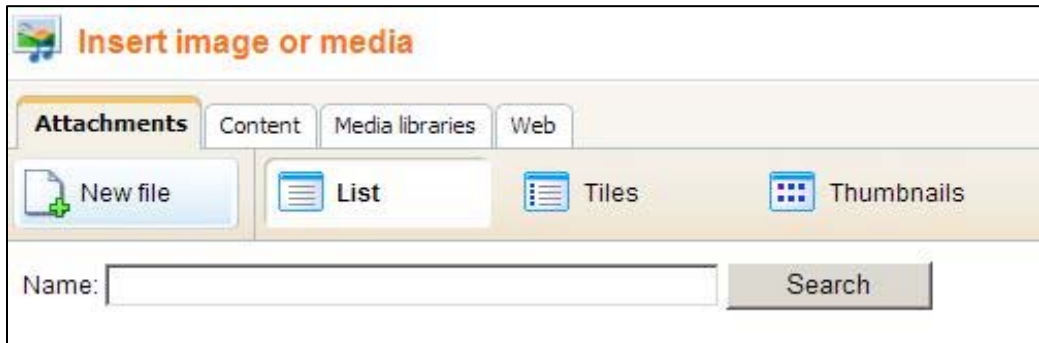


Figure 41: Image Media Dialog

4. On the image media webpage dialog, click on the Media Libraries tab.
5. Here you will find formatted images.

YouTube videos

1. On the editor, click on the YouTube icon (See Figure 42: Editor- YouTube)

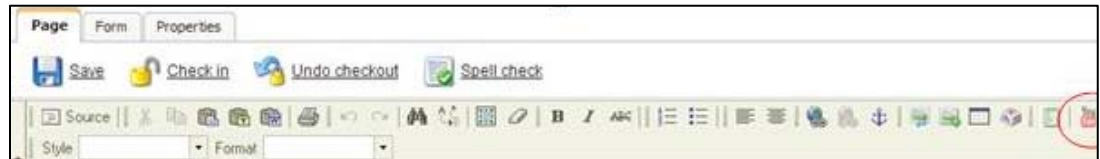


Figure 42: Editor- YouTube

2. In the URL field, paste the copied URL from the YouTube site. (See Figure 43: YouTube Dialog)

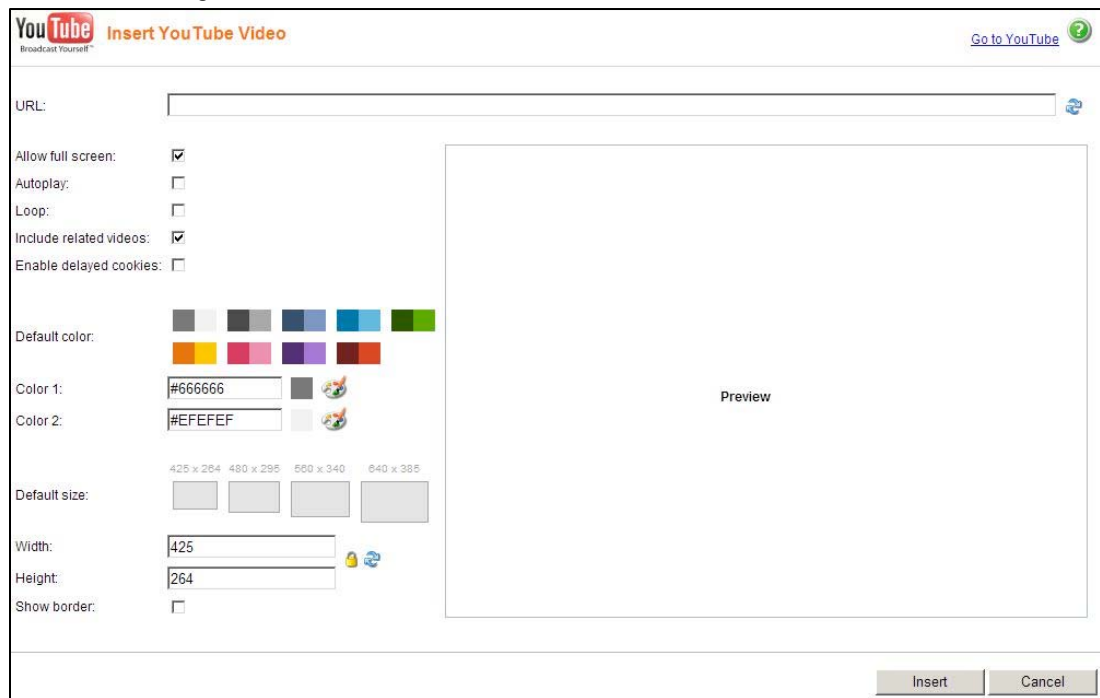


Figure 43: YouTube Dialog

Tables

First, make sure that your page is checked out, and you are on the editing mode. Then click on the location where you would like to insert your table at. Then, using the Editor:

- 1- Insert/ Edit Table: 

Now you will learn how to add a table to your web site.

1. Click the **Insert/edit table** icon in the editor.



2. In the **Table properties** dialog, you can select the number of rows and columns you want your table to be. (See Figure 44: Table Properties)

For example: change the number rows to 4 and the number of columns to 5. Then enter *my table* or your *table title* into the **Caption** field and click **OK**. (See Figure 44: Table Properties)

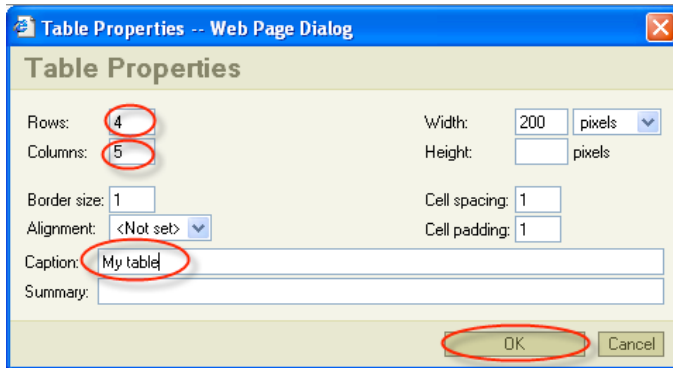


Figure 44: Table Properties

Deleting, Moving, and Organizing Documents

Deleting Documents

To delete a document, select the document and click on the **Delete** button in the document action toolbar. Once a document is deleted and destroyed, it cannot be restored. (See Figure 45: Document Action)

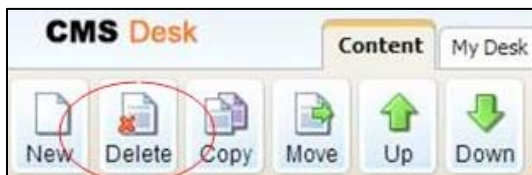


Figure 45: Document Action

Note: Make sure that the **Destroy document and its history** checkbox are **NOT** checked and click **yes**, look at the picture below. (See Figure 46: Destroying a Document)

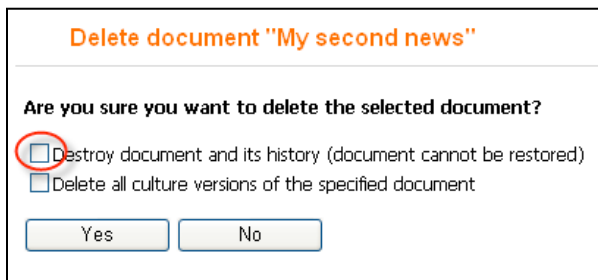


Figure 46: Destroying a Document

Restoring a Document

1. Under My Desk menu, click on Recycle bin
2. Click on my recycle bin, and you will see all the deleted documents on the right side. (See Figure 47 : Restoring Documents)

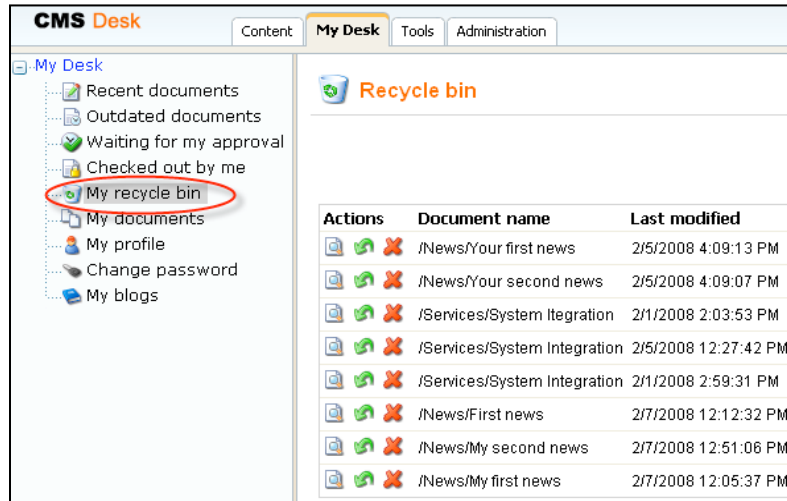


Figure 47 : Restoring Documents

3. Find the one you have just deleted and click Restore. (See Figure 48: Restoring a Document)



Figure 48: Restoring a Document

4. Now you can switch back to the Content tab and you will see the restored My second news added back to the default location.

Note: if you click on **X**, the document will be permanently deleted, and cannot be restored. Even IT people cannot restore it.

Changing document order

1. Click the document you want to relocate in the content tree and click the Down button in the document action toolbar. You'll see that your page has been moved. (See Figure 49: Changing Document Order)

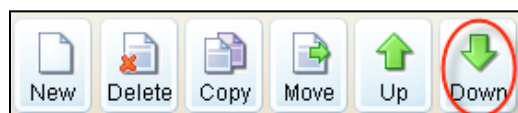


Figure 49: Changing Document Order

2. Now switch to the Live site view mode and you will see that your page has been moved in the main menu as well.

Moving documents to another section

Now, it's important to realize that the **Up** and **Down** buttons in the document action toolbar can be used only to move documents in one level of the content tree. To move documents to any location in the structure of web site you can use the **Move** button.

1. Click the page you want to move in the content tree. Then click the **Move** button in the document action toolbar.(See Figure 50: Moving Documents)

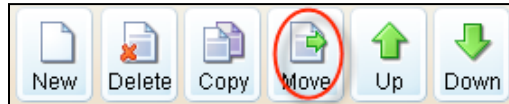


Figure 50: Moving Documents

2. In the web dialog, click on the document where you want to move your page (e.g. the Company section) and then click **Move document** button at the bottom.(See Figure 51: Dialog: Moving a Document)

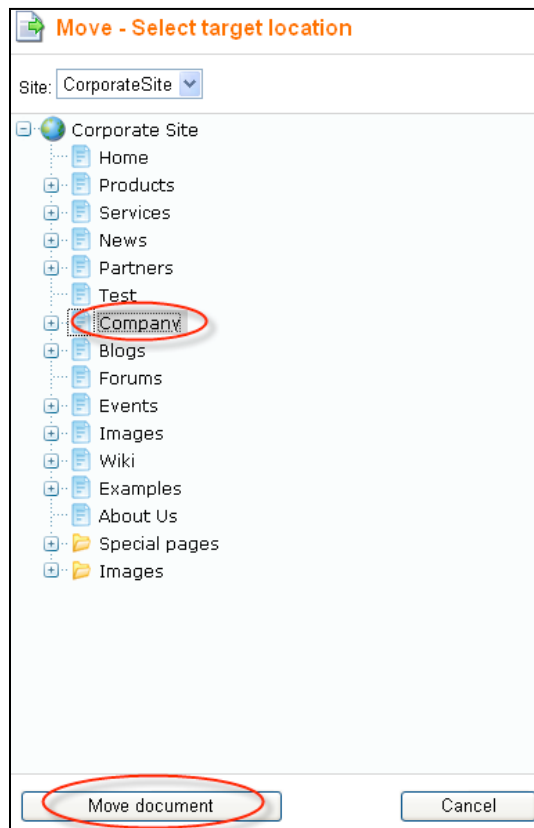


Figure 51: Dialog: Moving a Document

Your page has been moved to the chosen location.

Copying a document

Now you will learn how to copy a document from one place to another.

1. Click on the document you want to copy in the document tree and click the **Copy** button in the document action toolbar. (See Figure 52: Document Action: Copy)

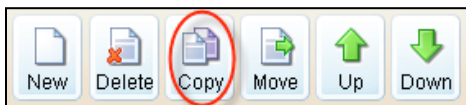


Figure 52: Document Action: Copy

2. In the web dialog click on the location where you want to copy your document. Then click the **Copy document** button at the bottom. (See Figure 53: Dialog: copying a Document)

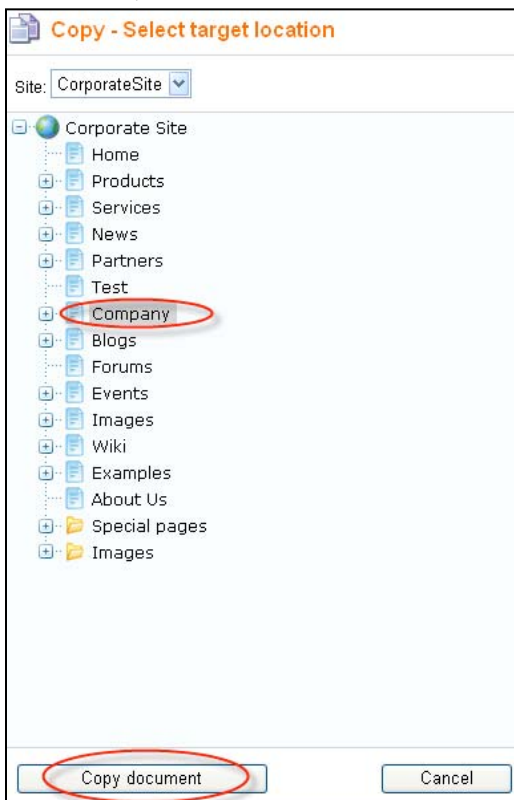


Figure 53: Dialog: copying a Document

You have just learned how to copy a document.

Workflow and Versioning

Once a web page or a document is created, make sure to save your changes frequently. When the page is created at first, the name chosen will represent the URL extension, the document name, and document title. The document name, title, and URL can be updated and changed. (See Figure 54: Workflow: Check in and Check out)

Note: Once you have created a document you have many ways to work with it. A new document is NOT necessarily saved or checked in. A checked in document is NOT necessarily published.

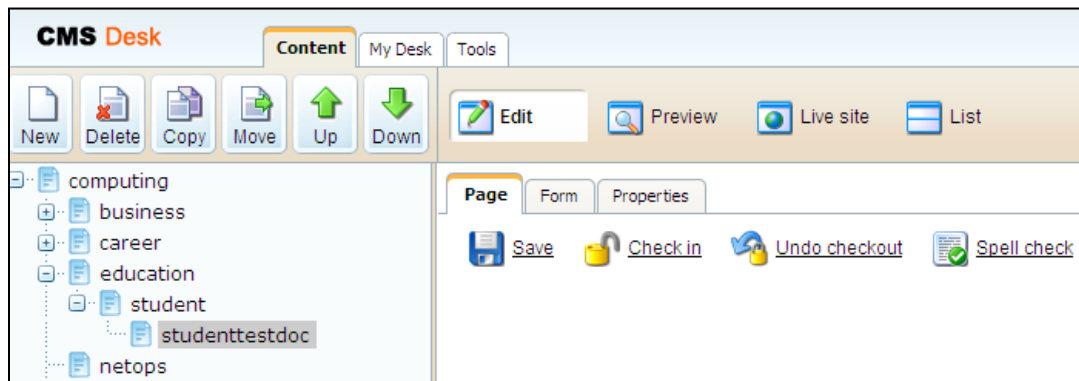


Figure 54: Workflow: Check in and Check out

Saving a Document

1. Make sure you are in the **Content Tab** on top and the **Page Tab** in the center
2. Click on the **Document** you wish to work with so that it is highlighted

3. Click **Save** 

Publishing a Document

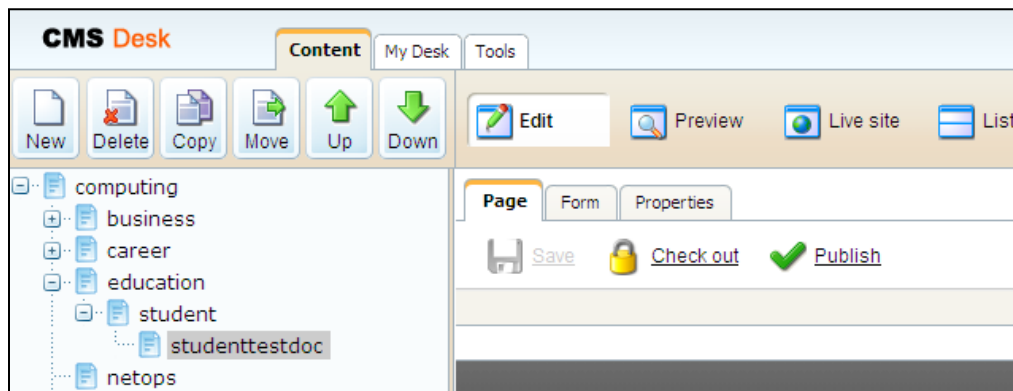




Figure 55: Publishing a Document

Note: A document must be checked in order for you to publish it.

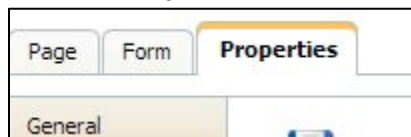
To publish a document:

1. Make sure you are in the **Content Tab** on top and the **Page Tab** in the center
2. In order to Publish your document, it must be checked in, notice the lock is closed 
3. Click the green check mark  to publish your document, and it is live.

Changing the Document Name and Title

Changing the Document Title

1. On the Content tab, find the page that needs to be edited
2. Check it out.
3. Click on **Properties**



4. Click on **Menu**

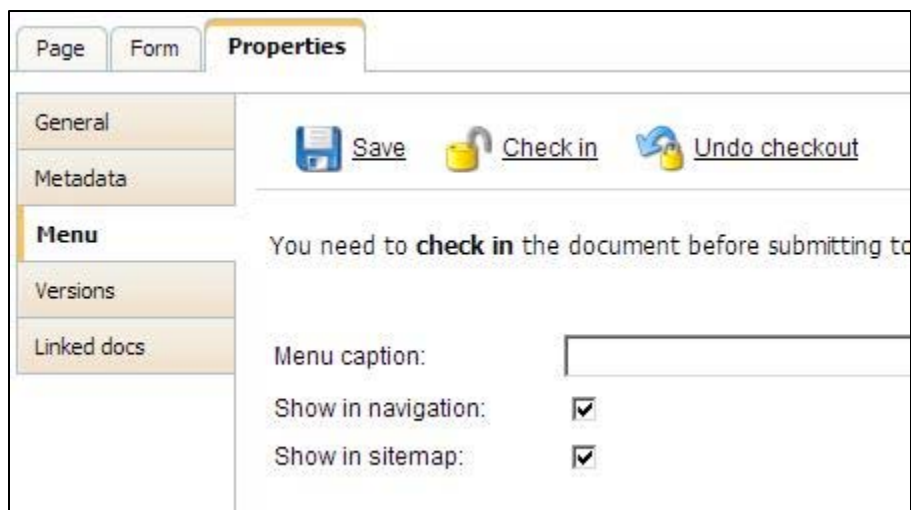


Figure 56: Metadata

5. Type the new page title.
6. Click **Save**.
7. Make sure to preview or refresh (F5) the page.

Changing the Document Name in the Document Tree and the URL
Go to your CMS Desk and under **Content** click on **Form**.

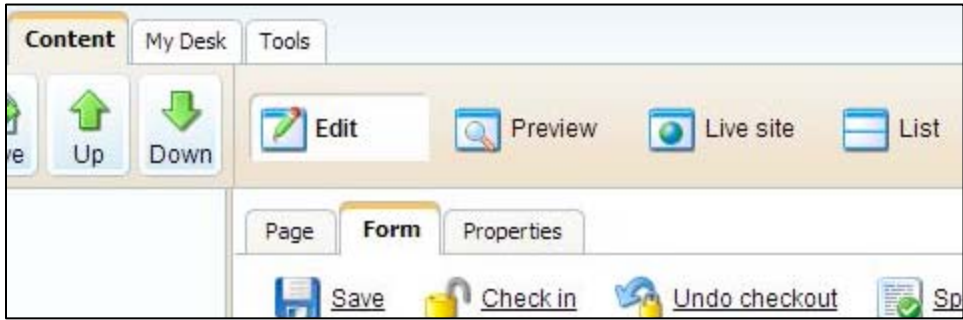


Figure 57: Changing the Document name on the Document Tree and the URL

On the Document name field, type the name as you like it to appear in the Document Tree and the URL.

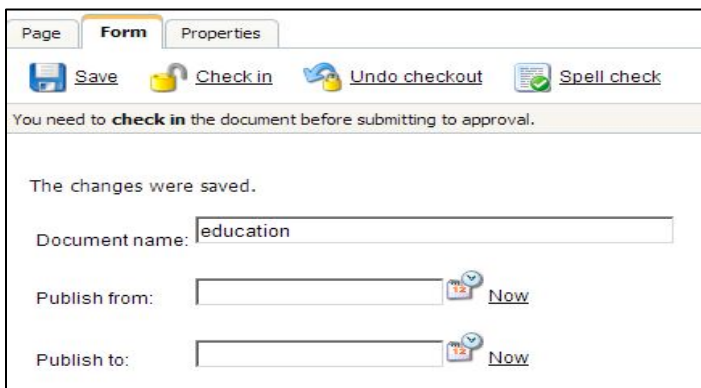


Figure 58: Form Dialog

When the page was created, it was named "business"

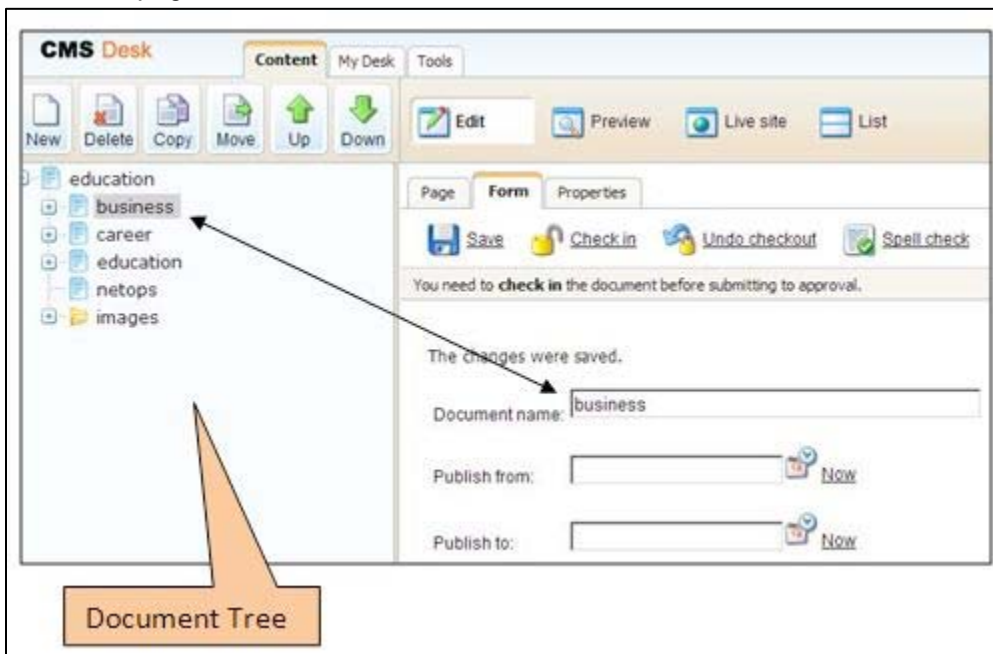


Figure 59: Example: Document Naming

Now, let's change the document name on the content tree

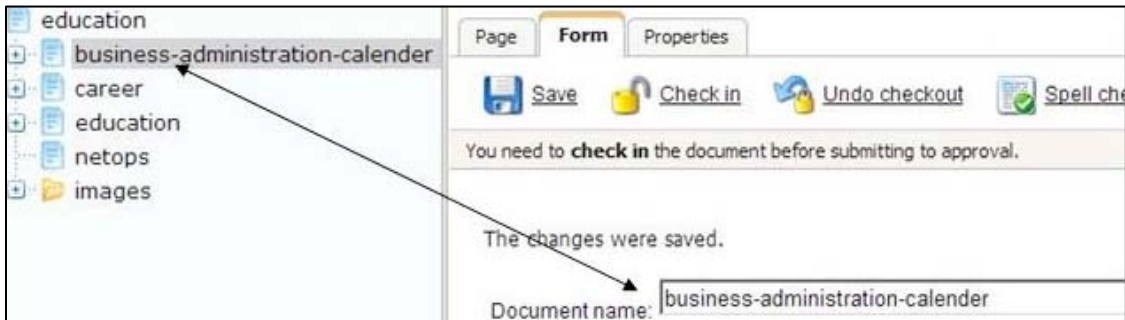
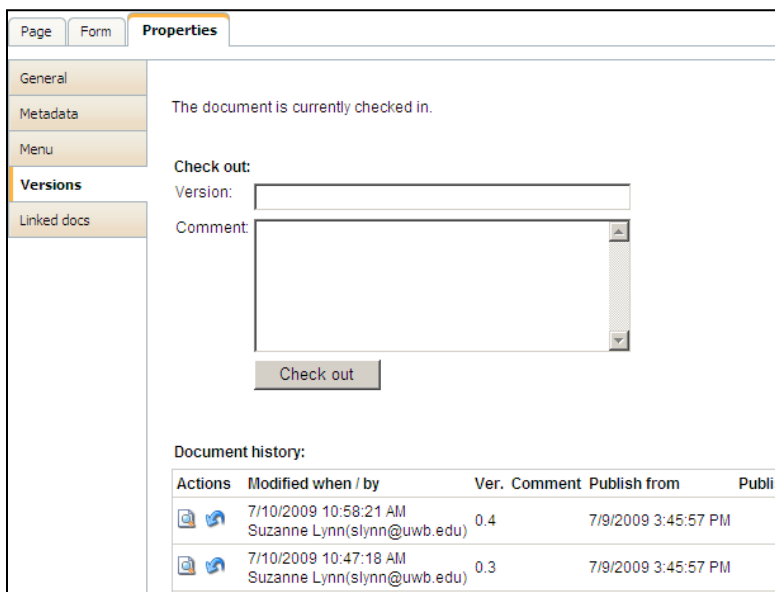




Figure 60: Changing the Document Name

The name of the page in the document Tree is updated to business-administration-calendar.

Versioning and rollback

Kentico CMS provides you with the option to rollback to previous version and add comments.



1. In order to work with the properties of a document you must be in the **Properties Tab**, and **Versions Sub menu**
2. You can do 2 things from this window:
 - a. **View Version Information** by Clicking on the **Version button** 
 - b. **Roll Back** to an older version by Clicking on the **Roll back button** 

BizForms

As a CMS editor, you will be able to link and edit existing BizForms to your documents; however, if you need to create a new one, you will have to contact Information Technologies at it@uwb.edu, and we will assist you with your request.

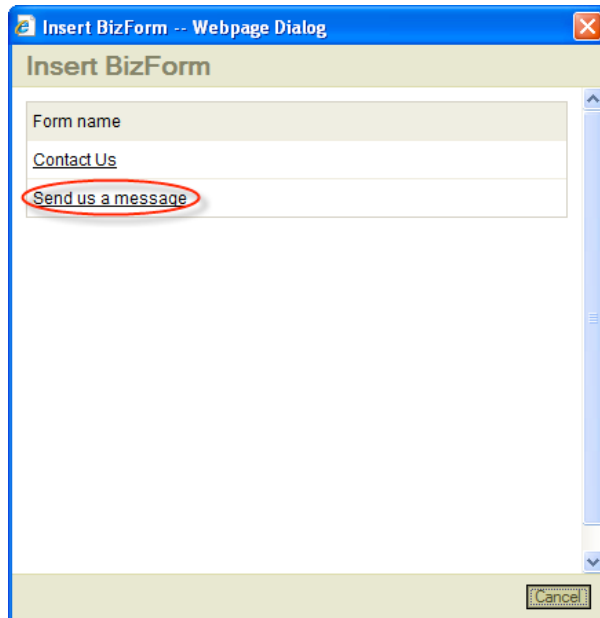
Linking a BizForm to your document:

1. From the Editor, click on BizForm icon (See Figure 61: Editor- BizForm)



Figure 61: Editor- BizForm

2. A window will open that displays a variety of pre-created forms. If your form is not on this list, please contact Information Technologies to have one created. Click on the BizForm that needs to be inserted in the document and select the OK button.



This will place code into your editor window. When the page is saved and previewed, the form will appear. In preview, this form can be tested and published.

Review BizForm Data

1. Under the Main Menu tab, click on Tools (See Figure 62: BizForms)

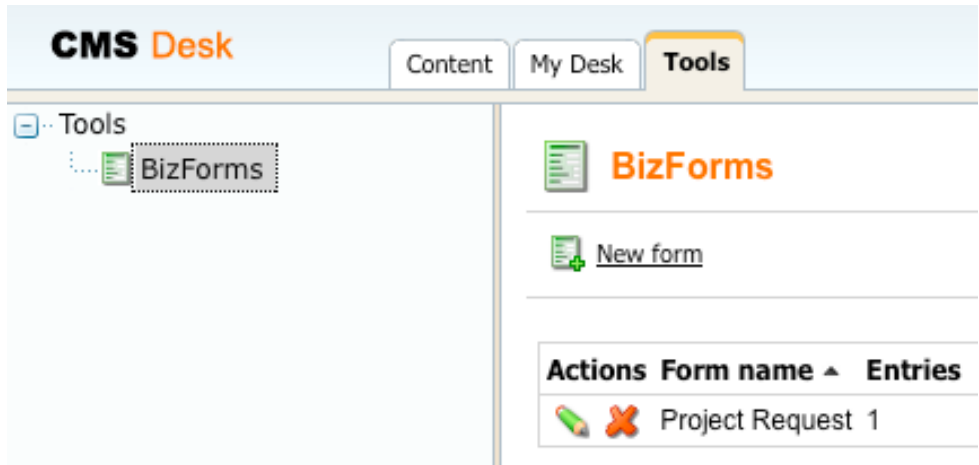



Figure 62: BizForms

2. Select Edit, or the pencil to display submitted data.



3. Data will display as a list of submissions. Select Edit to view the data.

Actions	projectRequestID	Form inserted	Form updated
  1		8/26/2009 4:21:21 PM	9/3/2009 4:37:52 PM
  2		9/4/2009 12:36:50 PM	9/4/2009 12:36:50 PM

There are many features BizForms have to offer. For a complete review of these features please contact Information Technologies at it@uwb.edu and request more information.

Dictionary

- CMS: Content Management System is used to manage content on your website.
- Document Actions: the toolbar that allows you to create, delete, edit, copy, and move or sort documents.



- Main Menu: allows you to switch the view between Content, My desk, and



- View Mode: allows you to choose between editing, previewing, live view, and list views



- Page Editing Mode: the selection that allows you to choose the way you want to edit the content of the page. You can choose from editing page content, document fields, or document properties.



Figure 63: Page Editing Mode

- Editor: produces HTML code as you type.



- Document Tree: hierarchical list of documents representing the structure of the website.

Quick Reference Guide

What is CMS?

Content Management System (CMS) is a web editing tool used to manage UW Bothell website.

How can I log in to Kentico CMS

- 1- Launch your browser and type: <http://edit.uwb.edu/cmsdesk>
- 2- Log in to CMS by entering:
 - a. Username: your FULL UWB email address.
 - b. Password: your UWB password.

Locating Documents

There are two options to locate a document

- 1- On the **Document Tree**, click on the Search tab, and type the name of the document you are looking for, and click search.
- 2- Browse for the document in the document tree.

Creating Documents

On Document Actions, click on new.

- 1- Select standard.
- 2- Enter the name of the document, which will also create the URL.
- 3- Click on Save.
- 4- Use editor to edit the content of your page.
- 5- Make sure to save and preview your page frequently.

Editing Documents

- 1- Locate the documents that need to be edited.
- 2- Check out the document so you can edit it.
- 3- Use editor to edit the content of the page.
- 4- Once done, save and check in the document

Publish Documents

After editing the document, preview your changes and select publish.

Media

Images can be linked and added by four different methods:

- 1- Linking and uploading using Attachments.
- 2- Linking and uploading from the Document Tree.
- 3- Linking and uploading from the Editor.
- 4- Linking from the Media Library.

BizForms

- 1- Contact Information Technologies at it@uwb.edu to have a form created.
- 2- Add a pre-existing form from the editor.

Find form data on the tools tab and select BizForms. Here you can select your specific form where you will find it associated data.