Quick Guide for dotCMS & Accessibility – June 2018

Training: http://pfw.edu/training

Login: https://authoring.pfw.edu/c

Release Lock: By default, when editing content, click Lock for Editing, then edit and save your content.

Save: Click to save content without publishing it.

Title: Enter the title for the content that best describes it. Adding the username of the creator is also recommended.

Select Folder: Click to choose the folder that the content resides in. It is best to choose the same folder as the page the content will be on.

Save/Publish: Click to save the content and publish so that it can be seen on the live site.

Editor Views: Click to switch between WYSIWYG, CODE, or PLAIN editors.
**dotCMS & Accessibility**

**Note:** The recommended browser for dotCMS is Mozilla Firefox.

**Logging In**
1. Open Mozilla Firefox and navigate to http://authoring.pfw.edu/c
2. Log in with your PFW credentials.

**Folders**

**Creating a New Folder**

**Note:** All folders showing on menu must have an index page.
1. Right-click the parent folder in which the new folder will reside.
   - **Note:** You may also double-click on the parent folder and choose **Add New > Folder** from the drop-down on the top right.
2. Click **New > Folder**.
3. In the **Properties** window, fill in the following:
   - **Title** – Enter the desired name for the folder (use full names instead of acronyms or abbreviations).
   - **Name (URL)** – It will be automatically filled in after selecting the field.
   - **Sort Order** – Enter a numeric value to organize the order of folders showing on the menu (Note: The first item starts at 0).
   - **Show on Menu** – Check the box if the folder should be shown on the menu.
   - **Allowed File Extensions** – Leave blank to allow any type of files to be uploaded to the folder.
   - **Show on Menu** – Keep it unchecked.
4. Click **Save**.
5. To publish, right-click the folder name and select **Publish**.

**Creating a Sub-folder for Images or Documents**

**Note:** Image or document folders do not need an index page.
1. Navigate to the desired folder.
2. In the upper right corner, click the **Add New** drop-down menu and select **Folder**.
3. In the Properties window, fill in the following fields:
   - **Title** – Enter images for an image folder or documents for a documents folder.
   - **Name (URL)** – It will be automatically filled in after selecting the field.
   - **Show on Menu** – Keep it unchecked.
4. Click **Save**.
5. To publish, right-click the folder name and select **Publish**.

**Menu Links**

**Creating a Menu Link**

**Note:** These steps create a link to an internal page, external page, or document. The link will show on the navigation menu.
1. Navigate to the desired folder.
2. In the upper right corner, click the **Add New** drop-down menu and select **Menu Link**.
3. In the Properties window, fill in the following fields:
   - **Title** – Enter the desired name for the link. Use full names instead of acronyms or abbreviation.
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Help Desk: helpdesk@pfw.edu

Helping Hand

2. In the upper right hand corner, click the **Add New** drop-down menu and select **Page**.

3. A window will pop up. Leave it as **Page Asset** and click **Select**.

4. On the **Basic Properties** tab:
   a. **Page/Menu Title** – Enter the desired title. DO NOT use acronyms.
   i. **Note**: Text will be displayed as the page’s title.
   b. **Host or Folder** – Make sure this has the folder the new page will be in.
   c. **Page URL** – It will be automatically filled in after selecting the field.
   i. If change is needed, use lowercase, keep it short, and unique to each page in a folder.
   ii. **Note**: Change it to *index.html* to make the page into an index page.
   d. **Template** – Click to choose the desired template.

5. Click the **Advanced Properties** tab.
   a. **Show on Menu** – Check if desired.
   i. It will show the page’s title on the navigation menu.
   b. **Menu Sort Order** – If **Show on Menu** is checked, enter a numeric value to sort the order of pages showing on the menu.
   c. **Friendly Name** – Enter the official full department name and the title/description of the page.
   i. **Note**: Use full sentences.
   d. **SEO Description** – Enter a brief description of the page.
   i. **Note**: Use full sentences.
   e. **SEO Keywords** – Enter keywords, separated by commas, which would be used to search for the page.
   f. **Page Metadata** – Leave it blank.
6. Click **Save**.

**Editing Page Properties**

1. Locate the desired page.
2. Right-click the page name and select **Page Properties**.
3. Click **Lock for Editing**.
4. Edit the desired field(s), e.g., Template, Friendly Name.
5. Click **Save** or **Save and Publish**.

**Publishing a Page**

1. Locate the desired HTML page.
2. Right-click the page and select **Publish**.
   a. **Note**: All related assets needs to be published before publishing the page.
Page Contents

Adding a New Content
Note: A contentlet can be removed from a page and can be reused on other pages.

1. Locate the desired page and double-click it. Click Lock for Editing to enter the page Edit mode. Once you have finished editing content, click Save or Save / Publish in the upper left corner to unlock the page.

2. In the upper right corner, click Add Content > New Content.

3. In the Title field, enter the department acronyms, the content summary or topic, and your username.
   a. Example: its quick guide username.

4. Click the Select Folder drop-down menu and choose the folder that the page resides in.

5. In the Body text area, type in the text that will be displayed on the page.
   a. Use headings, bold, italic, indent, bulleted, and numbered lists to format the text.
   b. Note: DO NOT edit colors, font family, and font size.
   c. Note: DO NOT copy and paste straight from a rich text editor (e.g., Microsoft Word) or from the Web.

6. To save the content, choose one of the following:
   a. Save – The content will be saved, but not published.
   b. Save and Publish – It will save and publish the content to the Web.
      i. Note: The contentlet will be automatically visible as soon as the hosting page is published.

Reusing an Existing Content
Note: When editing a reused contentlet, the changes made will affect the original as well as all reused contentlets.

1. Locate the desired page and double-click it to enter the page Edit mode after clicking Lock for Editing.
2. In the upper right corner, click Add Content > Reuse Content.
   a. The Search window appears.
3. To search the content, fill out one or more of the following fields:
   a. Title – Enter a part of or whole title of the contentlet.
   b. Select Folder – Click to choose the folder that may contain the contentlet.
   c. Body – If desired, insert word(s) that exist in the body of the content.
   d. Click Search.
4. Locate the desired content in the Matching Results list.
5. Click Select.
6. On the left side of the page, click Lock for Editing.
7. Edit the desired field(s).
8. On the left side, click Save or Save/Publish.
9. Click Cancel to return back to the page Edit mode.

Removing Content
1. Locate the desired page and double-click it and click Lock for Editing.
2. Locate the desired contentlet.
3. On the upper right corner of the contentlet, click the X button.
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Tabbed Content
Note: Tabbed content can only be added on a tab-enable HTML page. You can add a tab-enable page when creating or editing an existing page’s properties.

Creating a Tab-enabled Page
1. Navigate to the desired folder.
2. In the upper right corner, click the Add New drop-down menu and select Page.
3. Fill out the Page/Menu Title and Page URL.
4. Click the Template drop-down list and select a tabbed template, e.g., www.pfw.edu Silver – 2 columns (Left Navigation, Tabbed).
5. Edit the Advanced Properties.
6. Click Save.

Adding a New Tab Contentlet
Note: You can add up to 5 tabs on a page.
1. Locate the desired tabbed page and double-click it.
2. Click Lock for Editing. In the upper right corner, click Add Content > New Content.
3. Edit the Title, Select Folder, and Body fields.
4. On upper left corner, click the Tab Options tab.
5. Enter the Tab Title.
   a. Note: Text will be shown on the page.
6. Enter the Anchor Link.
   a. Note: This is the tabbed contentlet’s anchor name, e.g., charts (the full URL of the tabbed contentlet will then be www.pfw.edu/training/microsoft-office/excel.html#charts).
7. On the left side, click Save or Save / Publish.
   a. Click Cancel to return back to the page Edit mode.

Changing Tab Order
Note: The top most contentlet will be the left most tab.
1. Locate the desired contentlet.
2. Click the upward or downward arrow to change the position of the contentlet.

Adding Images to a Contentlet
Note: All the images must be uploaded and published into dotCMS before adding to a contentlet.
1. Navigate to the page to edit. Click Lock for Editing.
2. Create or edit a contentlet.
   a. For existing content, click Lock for Editing.
3. In the Body text area, place the cursor at the desired location.
4. From the toolbar, click the Insert/Edit Image icon.
   a. The Insert/Edit Image window appears.
5. On the right of Image source field, click the Browse icon.
6. On the left, use the plus (+) button to locate the images folder, example below:
7. Click the images folder and select the desired image.
8. Enter the Image Description and Title.
   a. If desired, click the Appearance or the Advanced tab to modify additional image options.
9. Click Insert.
10. If desired, repeat step 2 – 8 to add more images.
11. Click Save or Save / Publish when finished.

Upload Files

Uploading Images or Documents
Note: All Images should be descriptively named, edited, and/or resized before being uploaded (the recommended maximum width of an image is 400px). Names should not start
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with a numeral or special characters.

Note: All PDF and document files should be descriptively named, edited, and accessible before being uploaded. Names should not start with a numeral or special characters.

Single Image or File
1. Navigate to the desired images or documents folder.
2. In the upper right corner, click the Add New drop-down menu and select Image or File
   a. The Add File window appears
3. Click Select
4. Under File Asset, click Browse
5. Locate and open the desired file
6. Once the file is uploaded, enter a descriptive title for the image or file in the Title field.
   a. The File Name cannot be changed.
7. Click Save / Publish

Multiple Files
1. Navigate to the desired images or documents folder.
2. In the upper right corner, click the Add New drop-down menu and select Multiple Files.
3. In the File Asset section, click Remove.
4. Click Browse... to select and Open the new file.

Replacing Existing Files or Images
1. Locate the desired file/image and double-click it.
   a. Note: By default, the uploaded file is locked for editing.
2. On the left side, click Lock for Editing to release the lock.
3. In the Title field, enter a descriptive title for the image or file.
   a. Click Save/Publish.

Links
Note: All links should clearly identify their target.

Linking to an External/Internal Page
1. Create or edit a contentlet.
   a. For existing content, click Lock for Editing.
2. In the Body text area, highlight the desired link text.
3. From the toolbar, click the Insert/Edit Link icon.
4. For an external link:
   a. In the Link URL field, enter or paste the web page URL.
5. For an internal link:
   a. In the Link URL field, click the Browse icon.
   b. On the left side, use the + buttons to locate the desired folder.
   c. Click the folder and select the desired web page.
6. Click the Target drop-down menu and select the desired option.
   a. For external links, Open in New Window blank is
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8. Click Save or Save / Publish when finished.

Creating an Anchor Link

Note: Anchors are used to link to content or to text up or down on the same page.

Part 1: Create an Anchor

1. Create or edit a contentlet.
   a. For existing content, click Lock for Editing.
2. In the Body text area, locate the text to link to and place the cursor to the left of the text.
3. From the toolbar, click the Insert/Edit tag icon.
   a. The Insert/Edit Anchor window appears.
4. Enter the Anchor Name, click Insert.
   a. Note: It should be one word only and lowercase.

Part 2: Link an Anchor to Text

1. In the Body text area, highlight the text that will link to the anchor.
2. From the toolbar, click the Insert/Edit Link icon.
   a. The Insert/Edit Link window appears.
3. Click the Anchors drop-down menu, select the desired anchor.
4. Enter the Title.
5. Click Insert.
6. Click Save or Save / Publish when finished.

Creating an E-mail Link

1. Create or edit a contentlet.
   a. For existing content, click Lock for Editing.
2. In the Body text area, highlight the desired text.
3. From the toolbar, click the Insert/Edit Link icon.
   a. The Insert/Edit Link window appears.
4. In the Link URL field, enter mailto:email-address, e.g., mailto:username@pfw.edu
5. In the Target field, make sure Open in this window/frame is selected.
6. Enter the Title.
7. Click Insert.
8. Click Save or Save / Publish when finished.

Editing Code

You can edit code if you need to add or adjust certain aspects that you normally wouldn’t be able to with the tools already set.

Switching to CODE

You can go in and edit the HTML code by switching from WYSIWYG to CODE at the bottom left of the content box.
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Source Code Button
This button allows you to view the HTML Source Editor and change the code without exiting the WYSIWYG.

- Once you click the button, a separate window will pop-up with the Source code.

Creating Tables

Starting a Table
1. Click the Table dropdown.

2. Add in the rows, columns, and details you want. This can be later adjusted by clicking on the Insert/Edit Table button again or by editing the code.

3. Click Insert and begin filling in the cells.

Editing the Table
There are a few different buttons that allow you to edit certain parts of the table you have created.

- Insert Row Before/After: Allows you to insert a row before/after the one your cursor is currently in.
- Insert Column Before/After: Allows you to insert a column before/after the one your cursor is currently in.
- Merge Table Cells: Once you click this button, a window pops up asking for the number of columns and/or cells you want merged based on where your cursor is at.
- Split Merged Table Cells: Once pressed, if your cursor is where cells have been joined, it will automatically split the cells back up.

Deleting Rows or Columns
To delete rows/columns of a table, you can either:

- Click one of the Delete Row/Column tables by clicking on the Table dropdown.
- Or, you can go into the CODE and delete rows, columns, and cells.

Archiving a Page/Image/File/Link
Note: This will not delete the piece of content.

Note: When editing some page, there may be an option to Archive on the left panel underneath Lock for Editing, but this does not archive the page.

1. Locate the desired page or other type of content.
2. Right-click the content and select Unpublish.
3. Right-click the content and select Archive.
4. In the Actions window that opens:
   a. Leave the options listed under Publish as listed.
   b. Uncheck box listed for Never.
   c. Under Expire, select today's date in the dropdowns as well as a time in the past. For instance, if it is 10:30 am, select 10:15 am.
   d. Click the dropdown under Push To and select All Receivers.
   e. Click Add next to the dropdown, then click Push.

Note: The page disappears but it’s not deleted yet.

5. To view archived pages and files, at the lower right corner, click Show Archived.
   a. All the archived items appear.

Deleting an Image/Document/Link
Note: All images, documents, and links must be unpublished and archived first.
1. From the Admin Screen, select the Content tab.
2. To search for the desired page or file, select Advanced.
3. From the Type dropdown, select the type of asset.
4. Type in the Title, Folder, URL, or any of the other options listed to narrow the search.
5. From the Show dropdown, select Archived.
6. Click Search.
7. Right click on the desired piece of content and select Delete Contentlet.
8. Click OK in the dialog that pops up.