Version: 2.1

NHS Wales Websites CMS

User Guide for Web Content Managers

Contents

Getting Started

When you receive your new site, you will have a number of pages and other content items already in place for you. These items are all place holders and you will now need to populate these areas with your Organisations local information. You can now Add, Amend or Delete content as you see fit. Introduction to the CMS.

Content managers can lay out their sites in a variety of ways, promoting a flexible approach to web design that makes it easy to disseminate information clearly to both staff and public.

You can read through our guidance on Best Practice and Accessibility Guidelines to make sure you get the most out of your new NHS Wales Websites CMS Site.

Reporting Issues or Queries

If you require further support, in the first instance; you can browse all our NHS Wales Websites CMS resources on the NHS Wales CMS Support Site This site is a resource for content managers; here you can find guidance information and share best practice.
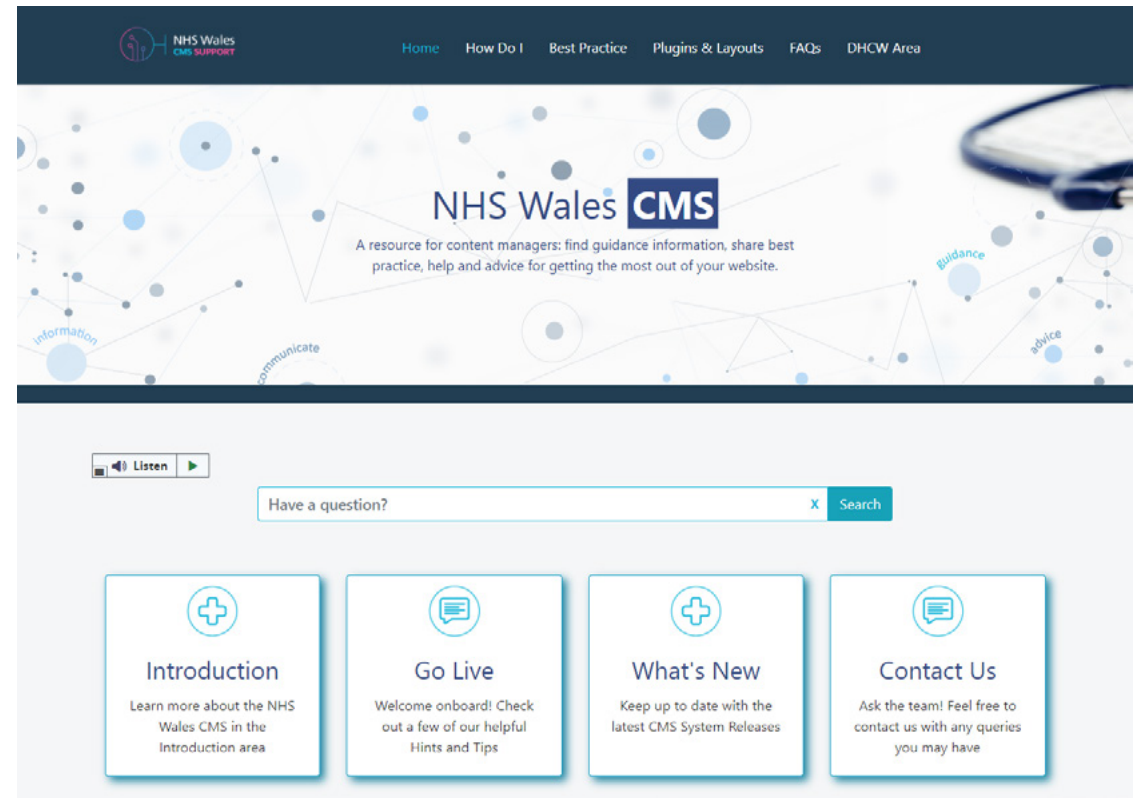
If you are unable to find you answer here then please log a ServicePoint Call to the Support Team: https://cmssupport.nhs.wales/contact-us/ Or call the helpdesk on 02920 502020

Logging into the System

To log into your site, you will need the site URL and a Username and Password.

| **Frontend Login**

01 **Browse** to your site URL: sitename.nhs.wales

02 Select **Esc + L**

03 **Enter** the username and password you have been issued

Please Log In

Username *

Username

Password *

Password

Log In

Forget Username or Password?

Enter your email address and we'll send it to you.

Email address

Email address

Get Password

Navigating the Admin Panel

Frontend Login

Once you have signed in as an Admin you will see the Admin Bar at the top of the site. This Bar will appear on any page that you have Admin access to; if you do not have access to Edit a page the Admin Bar will disappear.

Displays the Status of the Page

To add a content item

Identifies the user logged on

Hides the admin Bar

Make Layout & Content edits to the page

Open access to the backend of the site

Log out of your account

Access the Version History
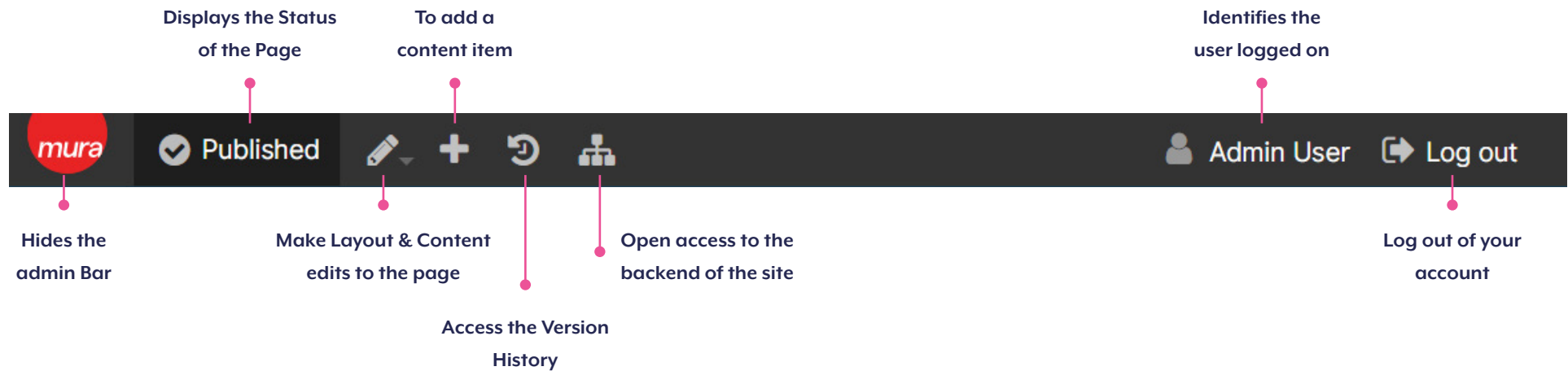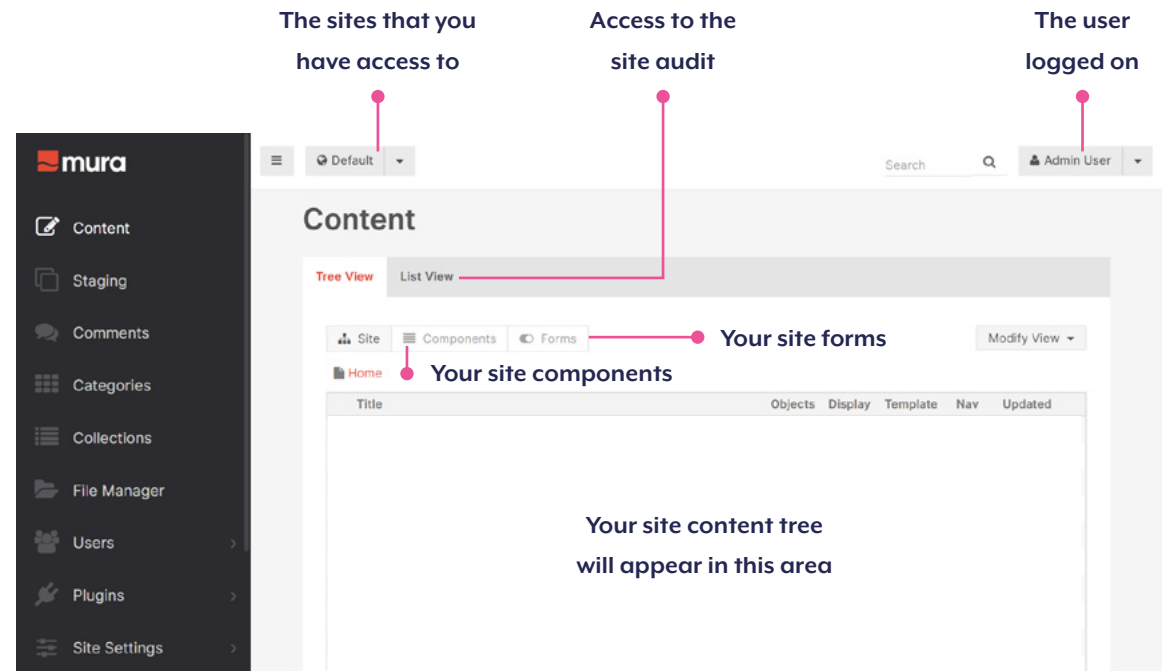
Navigating the Admin Panel

Backend Menu

Once you have signed in as an Admin you will see the Admin Panel; this Panel will display the Full Tree View of the site. At the Top of the page you will have a dropdown box that will display all sites that you have access to (If you select the site name the Front of the site will open).

Menu items available to you within the Left-hand menu will depend on the level of access you have been granted within the site. Although you will be able to see the whole Content Tree here, you will only have access to edit content that you have been granted access to.

The sites that you have access to

Access to the site audit

The user logged on

mura

Content

Staging

Comments

Categories

Collections

File Manager

Users

Plugins

Site Settings

Default

Search

Admin User

Content

Tree View   List View

Site   Components   Forms

Home

Your site forms

Your site components

Modify View

Title   Objects   Display   Template   Nav   Updated

Your site content tree will appear in this area

Permission Levels

A Site Administrator can add New Users and enable them to edit content within the website and allocate specific permissions to users. Dependent on what work the user needs to carry out, this may mean adding a user to a group, so that a set access level is inherited

Creating **New Users**

Editors Vs Authors

Site Editors can create and publish content whilst Site Authors can only create content; for these user types the Publish option would be disabled.

Once you have created your new user make sure to add them to the correct user group for the access level you would like them to have.

You do not need to add users to your Welsh website as this site pulls in the users created on the English website.

Users > Add User > Group Memberships

| Basic | Address Information | **Group Memberships** | Interests | Advanced |

User Type

○ Site Member   ● System User

System Groups

☑ Admin

Selecting the 'Admin' option under System Groups will give this user Full Access to your entire site

Permission Levels

Site Administrators have the ability to create User Groups with specific permission sets, allowing users to edit or publish content in some areas but not in others. When new users are created you will need to take into account what parts of the site you wish to allow the user to access.

Creating **Groups**

System Group Vs Member Group

The Key Difference between these types of groups is System Groups have access to the backend administration area of NHS Wales Websites CMS and Member Groups do not.

This doesn't mean Member Groups cannot edit content, it simply means users of Member Groups cannot log in to the backend administration area, unless they are also a member of a System Group.

Site Settings > Permissions

Remember to tick here to allow your groups access to your site

Restricted Access

You can control who can see your items by **Restricting Access.** This is useful if you are updating an item and only want certain people to see it. If someone visits the item, they will not be able to see the content if they do not have the correct permissions.

Tick the Restricted Access box

✅ Restrict Access to Specific Group(s)

Global Settings
  Allow All Groups
  Restrict All Groups
Member Groups
  CMS Members Basic
System Groups
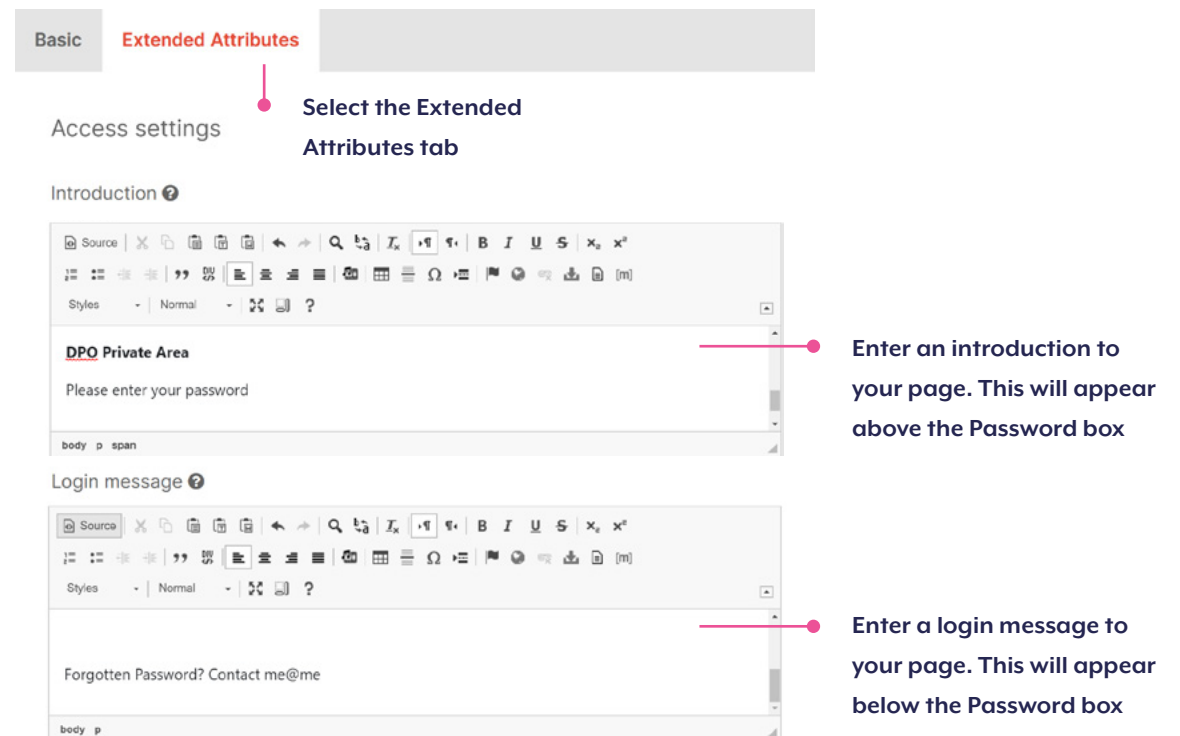 Advanced support
  CMS System Basic
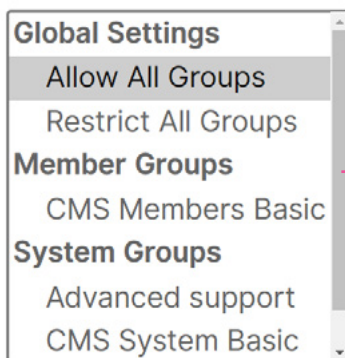
Select which Group/s to Restrict Access to

Password Protection

When accessing protected content (for example a page or folder), visitors will be presented with a login prompt where they are only required to enter a valid password.

To enable this type of **Password Protection** you will need to set up a Members Shared Access Group in the backend of your site. When added to a page, the Members Shared Access Group in conjunction with Restricted Access; presents a login screen requiring the users to enter a password.

Basic   **Extended Attributes**

Select the Extended Attributes tab

Access settings

Introduction ❓

DPO Private Area
Please enter your password

body p span

Enter an introduction to your page. This will appear above the Password box

Login message ❓

Forgotten Password? Contact me@me

body p

Enter a login message to your page. This will appear below the Password box

Pages

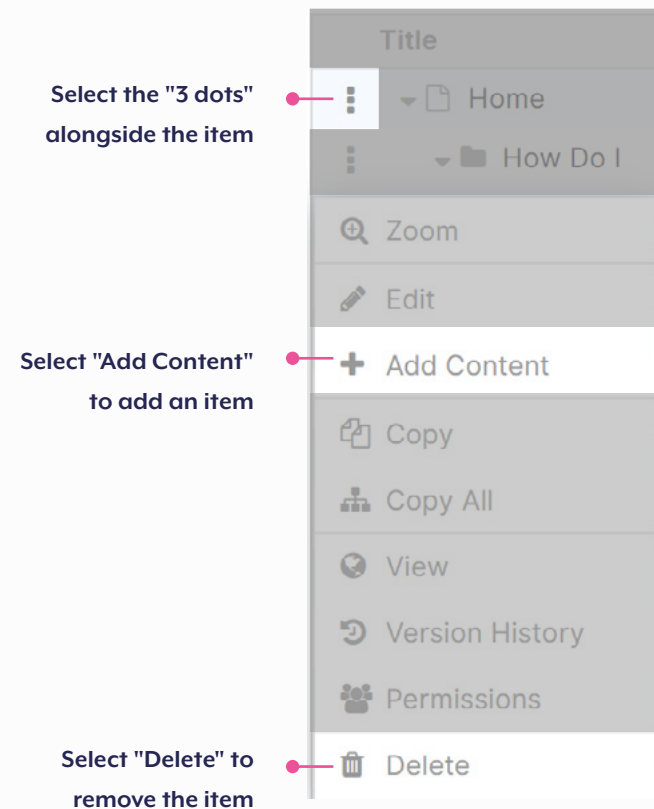## Adding & Deleting

You can Add Pages and Delete Pages on your website through both the frontend and backend of your site.

Frontend

Select the + icon

Select the "Pencil icon" & Delete

Backend

Select the "3 dots" alongside the item

Select "Add Content" to add an item

Select "Delete" to remove the item
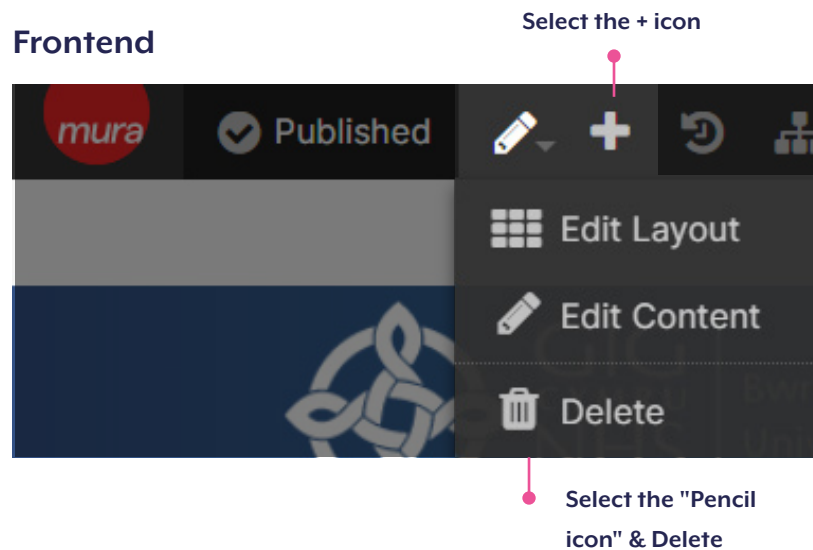
Pages

Publishing Settings

You will have a number of options of how and when you would like your page to display; such as Type, Layout and Publishing Scheduling options.

Use the Search Bar to search for specific options

Select each Tab to access and amend the details of your page

Cancel the changes you have made in this session

Save in an offline state - Preview how this will appear to your users

Publish Live on your site immediately

Save in an offline state - The page will not appear Live on the site

Save the page to a Change Set (bulk deployment set)

Pages

Building Content

Your site page is separated into a number of Regions. The main contents of your page should be entered into the 'Body' Region.

Visit our support sites for further information on how Site Inheritance can work for you.

Your main Navigation Bar •————

Your site Breadcrumb •————

Your Page Title •————

Enter your page content in the Body Region •————

————• These areas are for use with site inheritance. Content placed in these areas will flow onto the pages below

NHS Wales
CMS SUPPORT
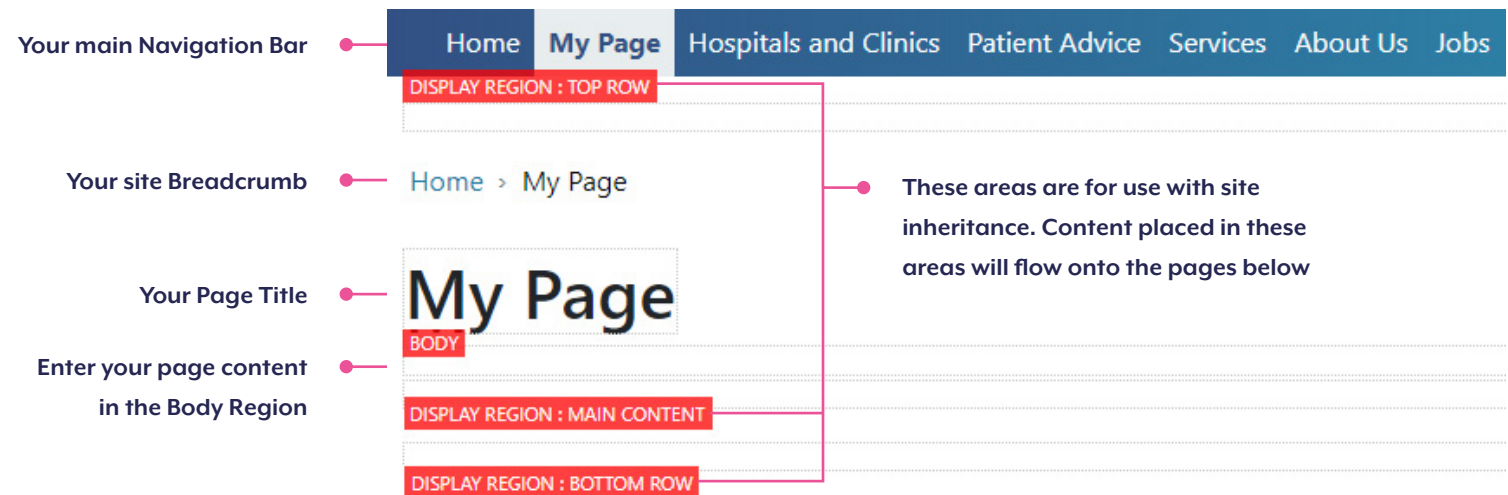
Pages

CK Editor Tool Bar - **First Row**

The CK Text Editor has a wide range of tools available for your use. Some of these functions are similar to what can currently be found in Word, whilst others are specific to the CMS.

Underline

Bold

Text Direction - Left to Right

Smaller letters - appear just **below** the line of Text

Find and Replace

Redo your last action

Paste from Word

Paste a piece of Text

Cut a Piece of Text

Access the HTML of the page

Copy a Piece of Text

Paste as Plain Text

Undo your last action

Search within your content

Remove all formatting

Text Direction - Right to Left

Italic

Strikethrough

Smaller letters - appear just **above** the line of Text

Pages

CK Editor Tool Bar

Second Row

Numbered List

Bullet point list

Insert block quote

Align Text

Left

Center

Right

Embed Multi Media from External sites

Insert horizontal line

Insert page break

Add a Link

Trac jobs feed

Add images

Increase decrease indent

Create div container

Justify Text - Fills the area

Insert Table

Insert Special Character

Create an anchor

Unlink content

Predefined templates

Third Row

Select from various styles to be applied to your text

Increase the edit area size

Styles   Format   ?

Select from various predefined font sizes to be applied to your text

Show all containers being used by your text
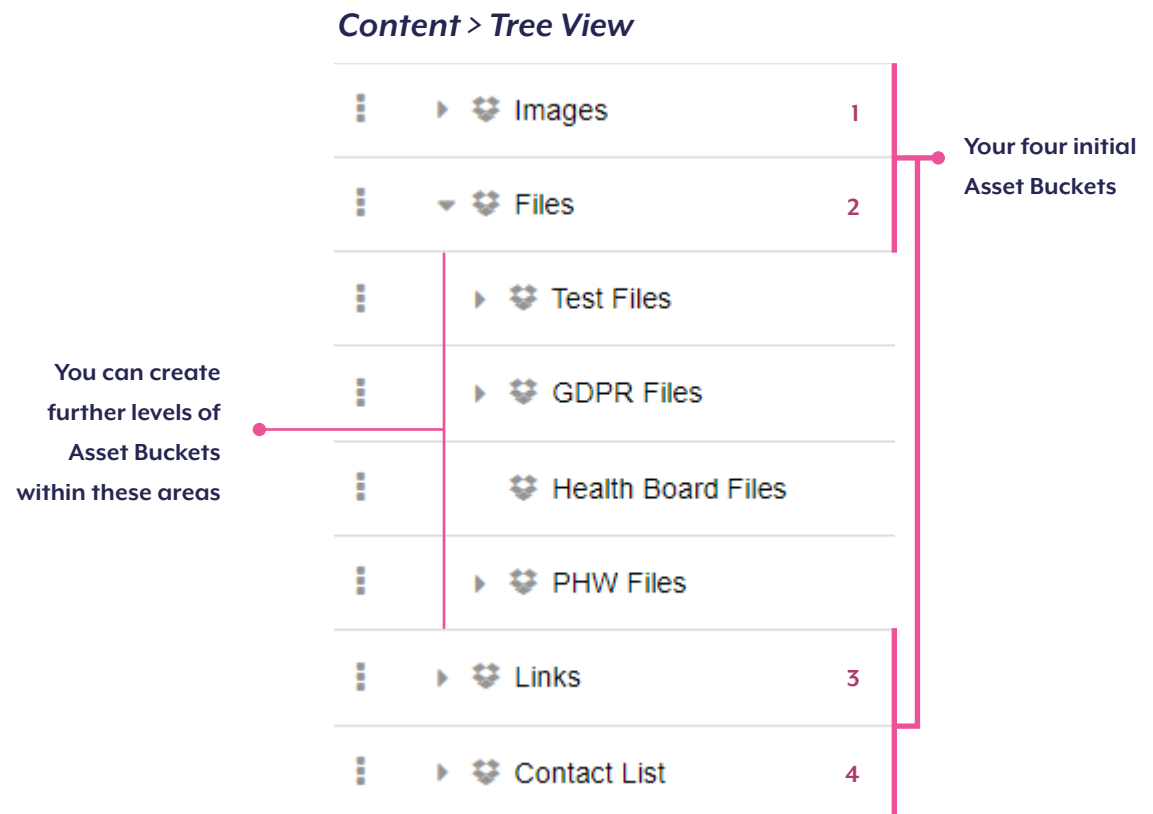
Asset Buckets

Asset Buckets much like Libraries; are a means to file together related content so it's easy for admin users to store and locate content. When you receive your site, you will have 4 set Asset Buckets; Images, Links, Files and Contact List.

You are able to create as many further Asset Buckets as you wish under each of these in order to sort and order your content into as many 'Libraries' as you require.

Content > Tree View

⋮ ▸ ✿ Images	1	
⋮ ▾ ✿ Files	2	
⋮ ▸ ✿ Test Files		
⋮ ▸ ✿ GDPR Files		
⋮ ✿ Health Board Files		
⋮ ▸ ✿ PHW Files		
⋮ ▸ ✿ Links	3	
⋮ ▸ ✿ Contact List	4	

Your four initial Asset Buckets

You can create further levels of Asset Buckets within these areas

Images

When **Uploading Images**, you will need to take into account where you would like this image to be stored. Will it be in an existing Asset Bucket or will you need to create a new one first.

Each **Image Size** has a default setting for small (80x80), medium (180x180), large (600xauto), profile image (400 x auto), featured block (320 x 515) and carousel (628 x 1506). The DPI or dot per inch for images on the web should be 72 DPI.

We advise, that the minimum size of the original image that is uploaded, should be the same as the carousel 628 px x 1506 px, so that when the system crops the images to the default sizes the quality remains. **Further Image Guidance**

Uploading Images

The system allows you to upload one image at a time through a browse option or you can select Quick Upload and drag and drop in multiple images to upload at once. **The system upload limit is set to 29Mb.**

On uploading an image six sizes for the image are created automatically (small, medium, large, carousel, featured block and profile). This gives the ability to display images with different sizes on the site.

Select Content Type ✕

⊕ Asset file bucket

▤ File

▥ Document

⬇ Quick Upload

Select Quick Upload as your Content Type

Images

Uploading Images

Remember to add in any relevant document information and **Alt Text.** Alternative text (Alt Text) is used by accessibility tools such as screen readers to help anyone who may have difficulties when browsing your site.

Drag and Drop images from your PC to this area

Select Upload to upload all images

The striped bar indicates the Upload is in progress.

Select Add files to browse to your PC

Drag and drop files to upload

Once the bar is solid green the Upload is complete

+ Add files...   ⬆ Upload   ⊘ Cancel

7.71 Mbit/s | 00:00:00 | 100.00 % | 109.87 KB / 109.87 KB

File name   front-cover-04.png

109.87 KB

PNG   Title   front-cover-04.png

Amend the image Title as you wish

Add in Summary/ Caption details   Summary/Caption

Credits   **Add in Credits**

Alt Text   **Add in Alt Text for Accessibility**

Images

Cropping Images

The size and resolution of an image has a huge effect on its display within your site and download time. While images can make your site looked polished and professional, having images that are squashed, stretched, blurred or too small looks unprofessional. Therefore, ensure that the image you are uploading is the correct size for the purpose on your website.

You are able to Re-Crop any of the six set Images to amend the area of image you wish to be the focus; the new crop can be saved or re-set. Cropping on one size of the image will not affect the other image crop areas.

Select the Crop icon

Find the image size you wish Crop and select the Re-Crop icon

front-cover-04.png

Click on the image and drag the box over the portion of the image that you would like to display
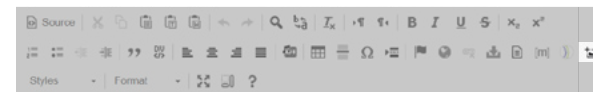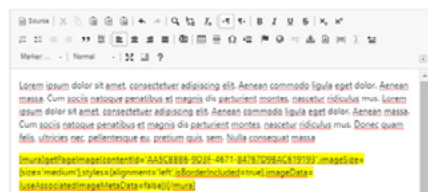
Select the Apply Cropping key

Images

Adding Images to your content

Through the use of the CK Editor tool bar you can search for any previously uploaded Image within your site and Add the Image to your Content. This image will then be added as a line of code to your page and render correctly once published. When viewing your page within the Edit you will only ever see this line of code.
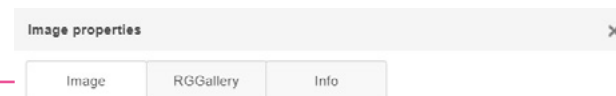
Select the Image icon in the CK Editor

Select the image tab

Search for your image by Title

Displayed on a Page
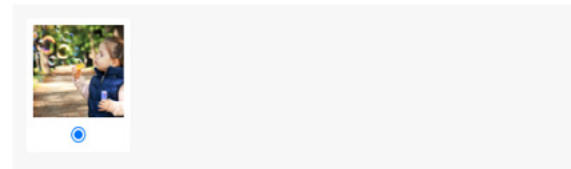
Select the Radio Button of your image

Search for an internal link to make your image a link

Select the image size

Select the image alignment

Include a border on your image
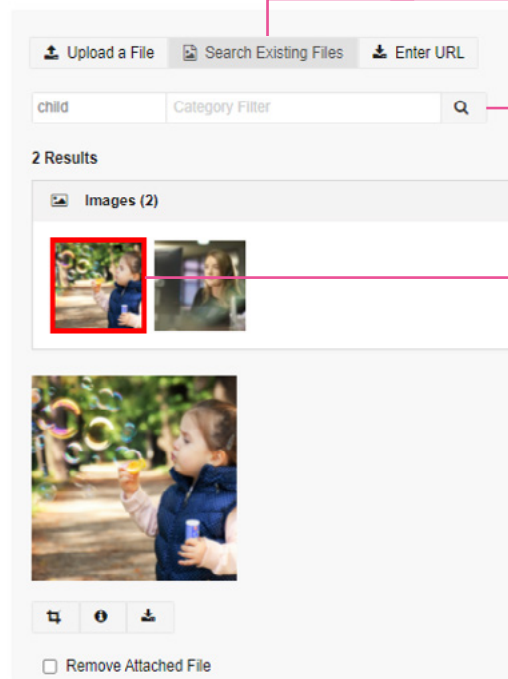
Displayed in the Edit

Display the image Meta data

Images

Associated Images

An Associated Image is an Image associated with a particular piece of content; in this context a webpage.

Within the Extended Attributes Tab, you can choose to display this Image on the page itself or just have this display when this piece of content is drawn into one of your sites Content Layouts.
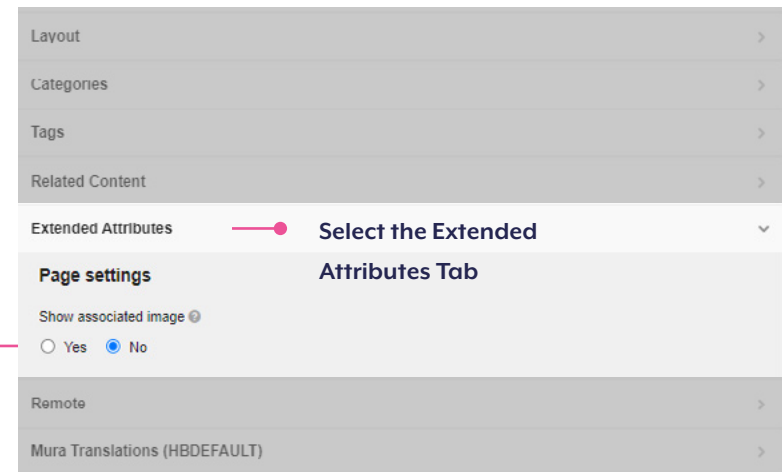

Search for images with your site

Search for your image by Title

A red box will appear around your chosen Image

Select the Extended Attributes Tab

Select Yes or No to Display or Hide the image on the page
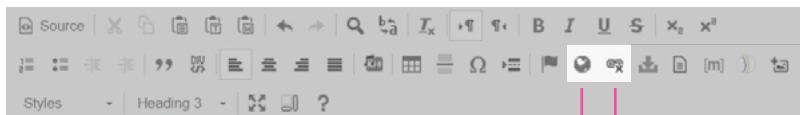
Links

———

Link text is basically any text words, numbers, or symbols on a digital document that provides a hyperlink to some other document, webpage, or Internet site. In order to meet accessibility guidelines your Link text will need to be meaningful and descriptive. The purpose of descriptive links is to provide users with the proper context of where clicking the link will take them.

You can Add Links to your content by highlighting the Linking word and selecting the Link Icon. If you are setting an External Link you would first need to place the External Link in your Links Asset Bucket.

Select the link icon to place a link

Select the Unlink Icon to remove the Link

Documents

———

When Uploading Documents you will need to take into account where you would like this document to be stored. Will it be stored in an existing Asset Bucket or will you need to create a new one first. The system allows you to upload one document at a time through a browse option or you can select Quick Upload and drag and drop in multiple documents to upload at once (dependent on size).

If you wish to add an Image to your document - You will need to amend the File type to File/Document. This would then allow you to show an Image with your document when they are displayed within a list.

When adding a document, you will need to add a Publishing date. This field can be found within the Publish Tab.

Content Collection

Content Collection is a collection of content drawn in through single or multiple Folders. They can be used in conjunction with the Collection Plugin to show your content in a wide range of Layouts such as: News Feeds, Carousels, Tabbed Content and many more. You are able to add filters to your Content Collection to draw in specific items only instead of an entire Folder of content.

You can create and edit your sites Content Collection on the back end of your website. In the left-hand menu select Collections.

To Add a New Index select Add Content Collection

To Edit an existing Content Collection select the 3 dots next to the index

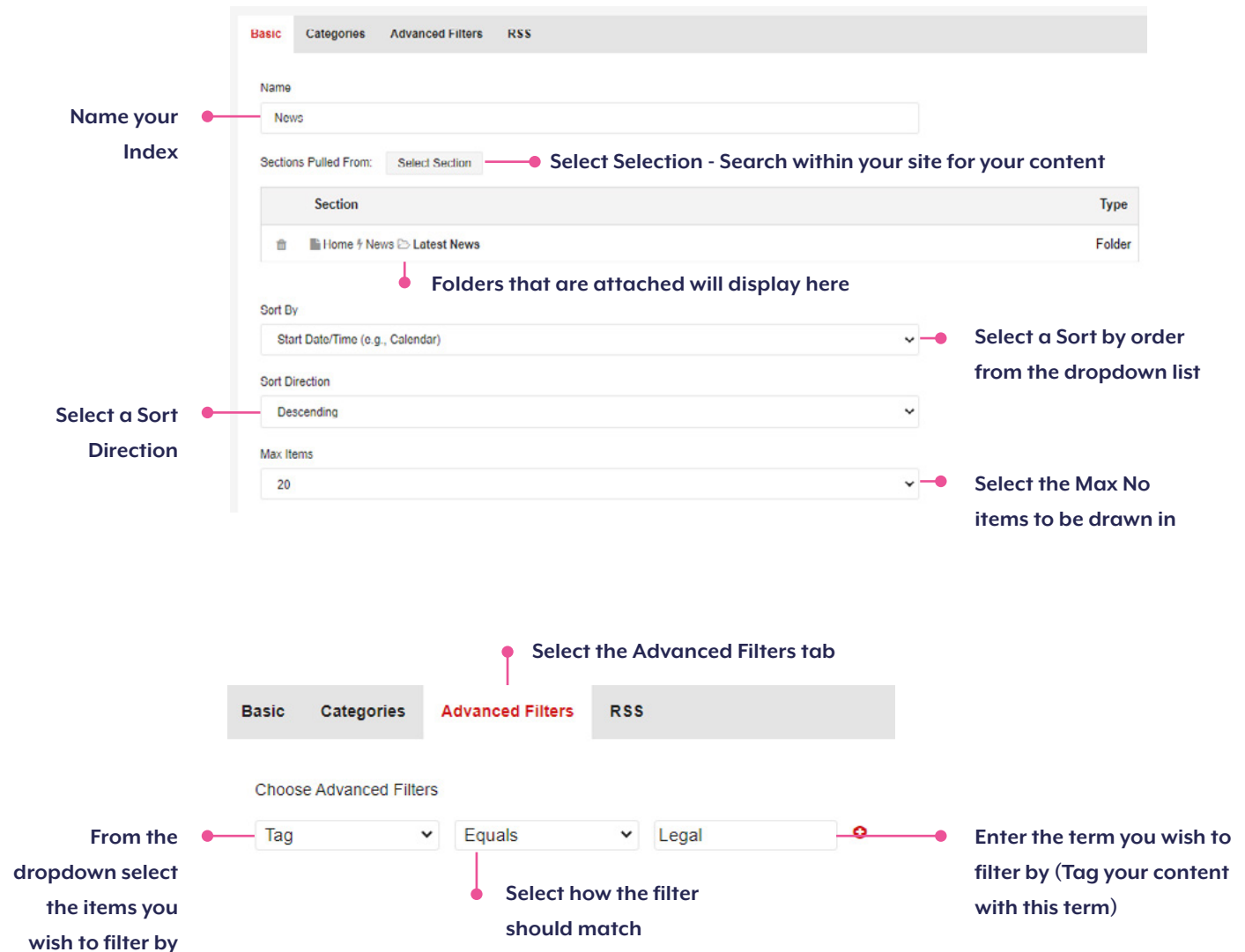All Content Collection on your site will be displayed in the area

Content Collection

Once you have selected Add Content Collection, you will then need to add in your Folder of content that you wish to display and amend the other settings as you wish. You will need to add in the Folder or Bucket the items are in, not the specific pages. You can add multiple Folders/Buckets to your collection.

Name your Index

Basic | Categories | Advanced Filters | RSS

Name
News

Select Selection - Search within your site for your content

Sections Pulled From: | Select Section

Section | Type
Home ⚡ News ▷ Latest News | Folder

Folders that are attached will display here

Sort By
Start Date/Time (e.g., Calendar)

Select a Sort by order from the dropdown list

Select a Sort Direction

Sort Direction
Descending

Max Items
20

Select the Max No items to be drawn in

If you wish to only draw in specific items within your Folder you can add in Advanced Filters. By selecting the Tab, you will open the Advanced Filters settings, amend these as you wish. Remember to go back and 'tag' your content with the Filter term you have used.

Select the Advanced Filters tab

Basic | Categories | Advanced Filters | RSS

Choose Advanced Filters

From the dropdown select the items you wish to filter by

Tag | Equals | Legal

Select how the filter should match

Enter the term you wish to filter by (Tag your content with this term)

Plugin Menu

A Site Plugin is an item that has been created to carry out a task for you (for example, the YouTube plugin adds and plays videos from YouTube). We have a wide range of plugins that are available to you as standard with your site.

Site Plugins can be found within the Edit Layout. These items are all drag-able to aid you with displaying your content. Some of the plugins currently available to you are:
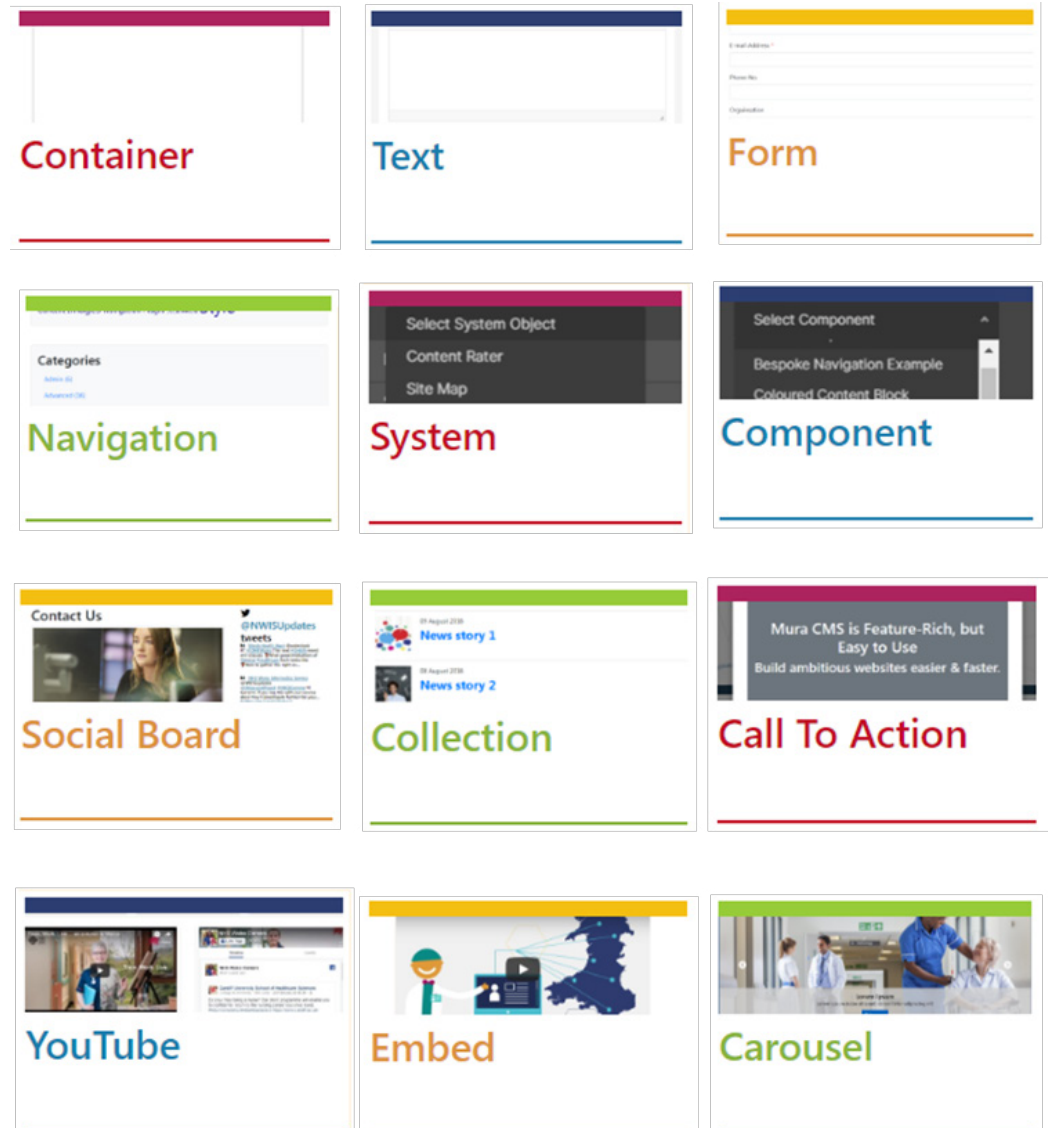
Plugin Menu

Space Saving Content Layouts

The CMS features a number of Space Saving Content Layouts. These Layout components have been specificity designed to declutter your Navigational Bar, whilst still giving maximum exposure to your important or most viewed content. These Layouts can be used in conjunction with Content Collection and/or single items of content.

You are able to implement as many or as few of these layouts as you would like. Some of the plugins currently available to you are:

Single Content 1
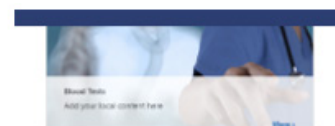
Single Content 2
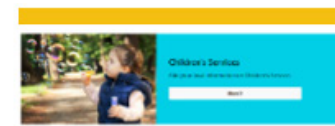
Single Content 3

Single Content 4

Multi Content 1

Multi Content 2

Box Block

Box Block 2

Accordion

Beautified Container

Tabbed Content
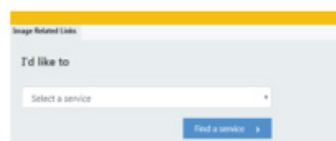
Link Organiser

Analytics

Your CMS Site works in conjunction with Google Analytics or Google Tag Manager. To utilize either of these first you would need to create an account, you will receive a GMT ID. You will need to provide this ID to NWIS for this to be added to your site.

- Your GTM ID key will look something like this - **GTM-xxxxxxx**
- Your GA ID key will look something like this - **UA- xxxxxxx-x**

Please note:

You will need separate IDs for your English and Welsh sites

Google Analytics generates reports and statistics about your website, like how many people saw your website yesterday, what web browser they used, which pages were the most popular etc. This data pulls in when you put a "tag" on all of your pages. The tag runs on the visitor's browser, which tells Google Analytics' servers that they are visiting the page right now.

The biggest benefit to **Google Tag Manager** is that it makes it easier for you to implement tags without having to rely on web developers. Once we add the Google Tag Manager code to your site you can then add any number of 'tags' within GTA without having to contact us.

For more information on how to use Google Tag Manager register to Google's introduction course **Google Tag Manager**

Auditing Content

On the backend of your site you can use the 'List View' option to Sort and Filter your content for search and Audit purposes. Here you are able to apply filters such as Type of Content, Created and Updated Date; This will then produce a paginated list of content.

Select Advanced Filters for extra search parameters

Select List View

Select a sort by type

Tree View List View

Showing All Site Content ⌄   Sort By: Updated Created Title

Advanced Filters ⌃

Select by Keywords, Categories or Tags

Keywords   Type   Default Tags

                                      All
                                      Calendar
                                      Component
                                      File
News Tags   Health Tags   File / Document
                                      Folder
                                      Folder / Asset contact bucket
                                      Folder / Asset file bucket
local ⊗   Folder / Asset gallery bucket
                                      Folder / Asset link bucket
                                      Folder / Blog
Select a Content   Folder / Gallery
Type of Filter By   Folder / Invisible
                                      Form
                                      Form / constantContact
                                      Form / ServicePoint   **Select Filter to**
                                      Link   **display your**
                                      Page   **results**
                                      Page / Accordion
                                      Page / Blog

Image ⊗

▼ Filter

Frequently Asked Questions

For a Full List of FAQs

Why isn't my page live?

You may have selected your Page to go live at a later date. Pages go live according to the Publish Date set within the Publishing Tab. Under Display, check that you have selected Yes

How do I change my Page Title?

Select the page in question from your page content list. Amend the Title section of the form, place a space at the end of your title and then delete it. This will open the Clear Additional Titles Tab. Select the Clear Additional Titles tab - this will ensure you also amend the page URL title.

What are the 404 and 500 Pages?

404 Page - will appear if a user types in a URL that does not exist within your website.

500 Page - will appear when there is an internal error with your website e.g. A server error

How can I Recover Deleted Content?

You will need to log a call with the support team to request this, please include as much detail as possible

Does the system have a Spell Check?

Chrome - Ctrl + Right Click
IE - Right-Click
If using In-Line Edit on the front of your site, any misspelling will automatically correct itself.

CMS Site Glossary

Administrator Mode

The system status after an admin has logged in, when site editing is enabled.

Frontend

The public facing part of your website that can be seen by all users.

Backend

The non public facing part of your website, the areas of your website that can only be seen once you have logged in as an Admin.

Edit Layout

Editing that can be conducted whilst viewing the changes that will be made. This is the area that site Plugins can be used within.

Header Row

The top region of your page, this area can utilise site inheritance.

Footer Row

The bottom region of your page, this area can utilise site inheritance.

Body

The mid region of your page (the content box when editing on the backend). This is the area your content should be placed within.

Tree View

The backend view whole of your website, this can be accessed through the Tree View Icon on the frontend of your site.

Plugin

An item that has been programmed to carry out a task e.g. the YouTube plugin which shows a video from YouTube. These are found within the inline edit.

Useful Resources

Links within the CMS Support Site

CMS Support Site | https://cmssupport.nhs.wales/

Introduction to the CMS | https://cmssupport.nhs.wales/introduction/

Accessibility Guidelines | https://cmssupport.nhs.wales/best-practice/accessibility/

Best Practice | https://cmssupport.nhs.wales/best-practice/

CMS FAQs | https://cmssupport.nhs.wales/faqs/

CMS Updates | https://cmssupport.nhs.wales/whats-new/

Contact Us | https://cmssupport.nhs.wales/contact-us/

Other External Links

Colour Blindness Checker | http://www.colororacle.org/

Colour Contrast Checker | https://contrastchecker.com/

Web Content Accessibility Guidelines | https://www.w3.org/WAI/WCAG21/quickref/?versions=2.0