

Content management system for www.nhsggc.org.uk 2015

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Introduction - Welcome to the Content Management System (CMS) training for the NHS Greater Glasgow and Clyde website (www.nhsggc.org.uk)

The CMS we use is **Umbraco 7**.

You can get support and information on Umbraco online. Please use these resources to support your training and content editing:

- **Essential** - Download the Umbraco 7 Editors manual PDF – you should have this to hand as you work on your site. <http://our.umbraco.org/projects/website-utilities/umbraco-7-editors-manual>
- **Essential** - LearnPro module - available from <http://nhs.learnprouk.com>
- **Optional** - Umbraco introductory videos are available free online at <http://umbraco.tv/videos/umbraco-v7/content-editor/>

Before your training you should

- be familiar with all standard web terms and using a web browser
- have experience of text editing for example using Microsoft Word

Browsers:

You must use one of the following browsers; Internet Explorer 10 or Google Chrome. Log a call with your local IT support desk if you do not have one of these installed on the PC to be used. (You might have a desktop logo showing Umbraco that will launch the right browser.)

Support after training

Staffnet page for FAQs, tips and updates:

http://www.staffnet.ggc.scot.nhs.uk/Corporate%20Services/Communications/Pages/Communications_webdocs_bam_160207.aspx

Email webteam@ggc.scot.nhs.uk

Management requirements

All web editors should

- Have approval from line manager / service lead to take responsibility for department content.
- Sign off to accept terms and conditions of the NHSGGC Web Content & Development Policy (at the end of this module).

Lucy Hartley, Web Officer, NHSGGC Communications

- Ensure content is managed regularly and effectively and that local processes are in place to support this.
- Ensure you use IE10+ or Google Chrome – contact the IT Helpdesk, informing them you are a web author for NHSGGC

What this learning module will cover

This module will introduce you to most functions in Umbraco required for www.nhsggc.org.uk, such as logging on to the system, finding your way around, editing, creating, moving and deleting pages and content; as well as adding images and documents and managing 'panels'.

Please refer to the Umbraco 7 Editor's Manual for detailed guidance on more advanced content management, such as scheduling (on and off), re-ordering, formatting text, version management, advanced image uploading, files and folders.

We will update our staffnet area with further information as the site develops.

Getting to work

Logging in

1. Go to <http://www.nhsggc.org.uk/umbraco>
2. Enter your username and password (you'll receive these in an email from the Webteam following completion of this module).

Administration menu

Identify the **section bar**, **tree view** and **content** areas.

The black section bar (left hand side) contains buttons to switch between functions. Click on each one and note what information is displayed.

- Content - shows the pages or areas available to you.
- Media – gives access to the document library and image library.
- At the bottom of the section bar is a ? Help button. This takes you to a wealth of Umbraco resources – external link.

(Click into the right hand content area, and then back into the tree view if the section bar fails to display the options expected under each button.)

The **tree view** holds information about your login at the top and an expandable list of the areas or pages you can edit. Click on the arrows to the left of headings to expand them. Click on the dots to the right, options icon (•••), to create new sections or subpages.

To the right hand side of the page is the **content area** for pages. Note the tabs across the top of this section which give access to different controls. We will look at these in detail later.

Site plan – understanding colours and sections

www.nhsggc.org is arranged in 5 main sections, visible on the home page. All content will fall under one of these sections. Your page will inherit the correct colour scheme for the section in which it belongs. This colour cannot be changed.

Creating/editing your pages

Making pages.

1. Hover over the name of the parent page and then click on the options icon (☰) to reveal the types of pages you can create.
2. **To create a basic page** - click on Standard Page which will load a new page into the content area on the right-hand side.
3. Look for 'Enter a name' in the text field at the top of the content area – and enter one for your page. Make sure it is short, unambiguous and relates to page content .
4. Enter a title for the page – this will show up as the main header
5. **Main Image/Carousel –Add.** You do not need to add anything to this box as pages will 'inherit' a default image if nothing is specified.
If you wish to add/change an image here then go to the + sign at the right of the page. Enter a title for your image. Click on the large + sign in the empty box below. A dialogue area opens to the right. Select Site Images>Header Images and then click on the image desired. More images will be added to this folder over time.
6. **Adding content** - Enter text for your page in the main content box.
Do not copy text from Microsoft Word – either type fresh text, or cut and paste from Notepad.(You can cut and paste from Word to Notepad and then to Umbraco)

You can use the tools in the bar above the box to add or remove links, bullet lists, indentation, bold or headings. Highlight the relevant text in the box and use the toolbar to add the feature required. Macros are also available and will be used for adding document lists below.

To add a link in the text area, highlight the text for the link, select the link button. This will open a dialogue area. Complete all three boxes

1. **Link** – enter URL (web address)
2. **Caption or Title** – this is an essential accessibility requirement describing your link, eg' link to consultation document(pdf) or 'link to external [ENTER NAME] website'.

3. **Target** – use the down arrow to right to select option to open link in the same window or a new window.

More on adding links in the Umbraco 7 Editors Manual pp18-22

To insert an image in this space, for example a team photo, click on the media picker tool >Site Images>choose folder>choose image and then click on the green 'Insert' button at the bottom right of the screen. We will look at uploading new images later.

More details on text editing options are available in the Umbraco 7 Editors Manual pp16-25

Save/preview pages

To save your page click on the up arrow to the right of the green '**Save and publish**' button and select '**Save**' – this saves but does not publish your page to the website. To Preview your page, click on the '**Preview**' button, your page will open in a new tab. If you are not satisfied with the page, return to the editing tab and make necessary changes. You can then Save and Preview again. Happy with your page? Click '**Save and publish**'. Your page is now published to the website.

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Publish/unpublish/schedule pages Please see the Umbraco 7 Editors Manual pp 8-10 for more options on publishing and scheduling pages – you can learn how to use the Properties tab to create and save a page for future publication for example.

Deletion

If you have pages that you no longer want on the website you can delete them.

1. Find the page you wish to delete in the website tree view.
2. Right click on the page name in the tree view **or** click the actions link in the top right when on the selected page.
3. Click **Delete**.
4. Click **OK** to confirm delete or click **Cancel** .

Upon deletion, the page is moved to the Recycle Bin as a safety net in case you change your mind and wish to restore the page. Full details on deleting pages and restoring from the recycle bin are in the Umbraco 7 Editors Manual p15

Quick Links panels

1. To create a Quick link box on your page
2. Select the Quick links tab in the content area of your page.
3. Enter a section title – eg link to Royal College of Nursing
4. Use the arrow in the grey area to expand the Quick links box.
5. Click on the + sign beside 'Link' to open a dialogue area. Complete all three boxes

For **external** links – enter URL (web address)

Caption or Title – this is an essential accessibility requirement describing your link, eg 'link to consultation document(pdf)' or 'link to external [ENTER NAME] website'.

Target – use the down arrow to right to select option to open link in the same window or a new window.

For **internal** links expand the 'Homepage' section under the Target box and navigate to the page you want to link to. Click on the page name to enter these details into the Section title and Link boxes. Remember to set the Target (as same window).

You can have up to four Quick Link panels in a row. More than four will create a second row below the first.

Content and links within your gateway area will keep the home colour for that gateway. Linking a panel to any content in another gateway area will change the colour of that panel to show the colour of the link destination. External links will be dark blue (or grey if chosen).

Sidebars

Use the sidebar tab to add a side bar to your page. These appear to the right of main content. There may already be campaign adverts in this area. You can change these on your own page if required.

1. To add text, images, links or a macro to the side bar click on the **sidebar** tab in the top of the content area
2. Add the required content in the text box in the same way as you did when creating your page.
3. If you change your mind, delete the content of this box by highlighting and using your keyboard DELETE key – do not use the **Actions>Delete** option as this will delete your whole page!
4. You can add a panel instead – select by using the **Sidebar panel +Add** button to choose. Expand the lists to choose an individual panel.
5. If you wish to display only sidebars created for this page tick the **Don't display parent sidebars** box. Leave this blank if you are happy with sidebars already on the page 'inherited' from previous levels.
6. **Save>Preview>Save and Publish** as before.
7. Remove a sidebar panel by clicking on the **red x** next to the name of the panel selected.

Panels -

Overview

Panels are a much more dynamic and visual way to display links. These can be links to your own content, publications, or digital media; or to other content within the NHSGGC website, or even on another website.

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Panels are individually created and are managed within a Panel Group, which sits under your microsite root. Panel Groups cannot be added to a standard page. Although you can create more than one Panel Group, only one Group can be displayed at any time (see further info on panels).

Creating a Panel Group

- Browse to the microsite root.
- Click on the 3 dot menu button alongside the microsite name.
- Click on Panel Group.
- Enter a name at the top of the page where it says: “Enter a name...” – simply click on this and start typing. Best to keep this short and sensible so you or anyone else knows what the group is for.
- Enter a title for the Panel Group. Keep this short and sensible as this is displayed on the live web page.
- There is a “Hide panels” tick box here – you could tick this until you’ve added all your panels, then unhide them as a group once they’ve all been created. Otherwise, leave this unticked and proceed.
- Ignore the Group link option as this only applies to the Homepage.
- Since the group is empty, you could click on up arrow on the “Save and publish” button and choose “Save”, so that the empty group isn’t displayed on the live website. Once you do add the Panels you can then go back to the Panel Group and click on “Save and publish”. However, if you plan to create all the Panels right away, you could simply click on the “Save and publish” button and proceed.

Adding Panels to the group

- Click on the 3 dot menu button alongside the Panel Group name.
- Choose either a Panel (for an individual link), or Panel Navigation (if you wish to create a list of links to different content). Most of the time, you’ll want to create a regular Panel.
- The Panel Content tab will open.
- Enter a name for the panel at the top of the page above the tabs. Keep this short and sensible! This is what appears in the left side of the content admin tree.
- Enter a Title – again short and sensible. Depending on the panel type, this is displayed on the panel when viewed on the web page. Most of the time, this can be the same as the name.
- Content – a very brief few words about what this link is going to; ie “Read our annual report”. If you need more words, pick a specific panel layout that works!
- Link – Click on Add. You can either link to content within your pages, or to a file, or to another website / webpage.

- To link to Content
 - Expand the Content browser to locate the page you wish to link to.
 - Once you find it, click on the name of the page and a tick will appear alongside it.
 - Click the green “Select” button.
 - The Link option will now display the destination.
 - Click Select to proceed.
- To link to a file:
 - Click on the Link to File button at the bottom of the page.
 - Choose the location of the file you want to link to – ie Document Library, or one of the image folders.
 - Browse through to the file you want to link to and select it.
 - If it’s a document, it may fill in the Caption/Title for you, depending if this information is present within the document.
 - If you wish, you can change the Caption/Title.
 - The Target drop down has 3 options which are fairly self explanatory – but our advice is use “... in a new window or tab”, as this will keep the original web page open for the user to easily go back to after viewing the file.
 - Click Select to proceed.
- To link to another website or webpage, or external file:
 - Simply type or copy and paste the URL (or web address), or document link on another site - always ensure you include at the start http:// - for example http://www.nhs24.com.
 - Enter a Caption / Title – this is what appears as the link text within the Panel.
 - For website links The Target should always be “Opens the link in a new window or tab”.
 - Click Select to proceed.
- Icon – only choose an icon if you intend to use the plain Panel which simply has a name with the icon. Choose an icon which corresponds with what the link is doing or going to.

If you do choose one and didn’t mean to or no longer want it, don’t worry, as it won’t be displayed if you choose or change to a Panel that doesn’t have the icon on it.

- Click on the Panel Layout tab to choose the type of panel you want.

There are 5 layout styles to choose from - 4 which use an image and 1 which only has an icon.

The Panels containing a colour will use the colour which corresponds with the gateway your content belongs under. The colour shown is just for illustration purposes. If you link to content within another gateway, the colour of the panel will correspond with the destination content gateway colour scheme.

There is a grey panel for neutrality, useful for linking to external destinations, however the link colour will correspond with your gateway colour scheme.

- Select the style you wish to use. If you have quite a few Panels, mix and match the styles to create less uniform look to your page. Depending on the type of content you want to display some panels may be more suitable than others .
- Next, choose the panel width. Panels are displayed within a 3 column layout; so you can have 3 single width panels in a row, or 1 single and 1 double width panel in a row. If you create 4 single width panels, then the last one will drop down to the next row. If you create 2 double-width Panels, then the 2nd one will drop to the next row.
TIP Always try and ensure you have a complete row of panels! Adjust the width options if required.
- Click on the Save and Publish button.

Continue to add as many panels as you need.

To edit a Panel, simply click on its name in the Tree view.

Moving Panels

To change the order of the Panels within the Group:

- Right click on the Group name.
- Choose Sort.
- Drag and drop the panels into the order you want them to appear.
- Click Save.
- Remember to check how it looks on the web page. You may need to change the Panel styles or widths to ensure you don't have blank spaces and that rows are full.

Further info on Panel Groups

You can create more than one panel group, but only one group can be displayed. This is the first or top group in the list, so if you want to change the group being displayed on the page, you need to move it to the top of the tree within that section. Right-click on the Mircosite name and choose Sort. You'll see a list of the panel groups and pages within that microsite. Simply click on the group you wish to display on the page and drag it to the top of the list.

All the standard Umbraco functions can be applied to Panels and Panel Groups, such as Publish and unpublish dates, Move, Delete, Rename, Hide, Sort, etc. Please refer to the Umbraco Editors Manual for details.

Auto Quick Links (In Page Panels)

Overview

These are a more visual way to display navigation to child pages or microsites within your root microsite. They are very similar in appearance to regular Quick Links, but unlike Quick Links which are manually created; these are generated automatically based on what option you choose under the In Page Panels tab - ie display child pages, child microsites or both as panels.

These can be useful for quickly populating your homepage with panels and can be used along with standard Quick Links and Panels.

To manage these:

- Click on the name of your Microsite.
- Click on the In Page Panels tab.
- Select the appropriate option – list, panels, list full width and list title if a list is chosen.
- Save and publish (no preview option).

Simply untick any options to stop displaying the In Page Panels.

Images

Your page will inherit the main banner images and adverts from its 'parent' page. There is no need to change these, but you can use the Main Image/Carousel box as above if you wish to add or change the image.

You can add images in the main content box, the secondary content box, in a panel, or as a side panel. In each of these Use the + buttons to open the dialogue area and select an image from tool >Site Images>choose folder>choose image and then click on the green 'Insert' button.

Upload a new image.

Before you start

- Your image must be a minimum of 271 pixels wide, to a maximum of 1024 pixels wide. Resolution must be 72dpi.
- You must have the legal right to use the picture

- We recommend that you use images from www.nhsscotlandphotolibary.org which are freely available to NHS staff in Scotland
- You should choose images that meet uniform/dress code requirements when depicting staff in clinical scenarios or patient interactions

More advice at

http://www.staffnet.ggc.scot.nhs.uk/Corporate%20Services/Communications/Pages/Communications_webdocs_bam_160207.aspx

Insert an image

Once you have a suitable image saved to your PC/network folder then, in Umbraco

1. Go to the section bar.
2. Pick the media button from the black Section bar.
3. Pick the folder you want to store your image in from those displayed in the tree view.
4. In the content area 'Enter a name..' at the top of this area. Make it meaningful
5. Click on the 'Click to upload' arrow and select the image required from your PC/network folders
6. Type a caption into the 'altText' box. This is an essential accessibility requirement and will be displayed by the user's browser. For example – 'picture of physiotherapist with adult male patient'.
7. Click Save.

Your image will now be saved into the folder you selected. It can be used in any of your pages. Further details on working with images are available in Umbraco 7 Editors Manual pp31-33

Document library

Before you start

- All document files must conform to the NHSGGC Accessible Information Policy. Details are on Staffnet with advice on how to create accessible information and accessible document formats.
<http://www.staffnet.ggc.scot.nhs.uk/Info%20Centre/AIP/Pages/AIPPortal.aspx>
- Document file format should always be accessible PDFs. Microsoft Word, Excel and PowerPoint should be converted to PDF. Adobe help and Staffnet give advice on creating accessible PDFs.
- You must have the legal right to use the document file and contents. If you wish to post material that is not copyright owned by NHSGGC then you must check with the copyright owner. Be cautious when publishing presentations or posters that have been produced by individuals not employed by NHSGGC and obtain written consent to publish such material in any format. Staffnet has more on copyright at
<http://www.staffnet.ggc.scot.nhs.uk/Info%20Centre/Library/Pages/Copyright.aspx>

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Upload a new document

Once you have a suitable document file saved to your PC/network folder then, in Umbraco

1. Go to the **section bar**.
2. Pick the **media** button from the black Section bar.
3. Pick the folder you want to store your document files in from those displayed in the tree view.
4. Click on the options icon (**•••**) and pick the **document library file** option.
5. In the content area '**Enter a name.**' at the top of this area. Make it meaningful
6. The **File** tab should be open in the content area, if not click on it to open.
7. Click **Save**. You can save as you go, the **Save** button is displayed at the bottom of the content area under each tab.
8. The **Actions** button at top right of your screen gives access to **Move, Delete** and **Sort** options for your document files.

Your document will now be saved into the folder you selected. It can be used in any of your pages. Further details on working with document files, including how to move files, are available in Umbraco 7 Editors Manual p32

Library structure, using folders

- **Pre 2015 users** - When you first access the Umbraco 7 CMS, your folder structure will be as it was before. However, you will be able to create more sub-folders to better organise your documents
- **New users** –you will have a minimum of one folder into which you can load documents. You will be able to create more sub-folders to better organise your documents.

Create a new document folder

1. Go to the **section bar**.
2. Pick the **media** button from the black Section bar.
3. Pick the folder you want to create your subfolder in from those displayed in the tree view.
4. Click on the options icon (**•••**) and pick the **document library file** option.
5. In the content area '**Enter a name.**' at the top of this area. Make it meaningful
6. Use the **Admin** tab
7. You can ignore the legacy id and Microsite root boxes
8. Tick the Active box to add this folder to searchable folders on the site.
9. Information is loaded automatically into the **Properties** tab
10. Click **Save**. You can save as you go, the **Save** button is displayed at the bottom of the content area under each tab.
11. The **Actions** button at top right of your screen gives access to **Move, Delete** and **Sort** options for your document folders. **Beware** - Deleting or Moving a

folder will delete or move all the contents of that folder and all subfolders and their contents. Use with caution!

Document links

See the Umbraco 7 Editors Manual p20 'Link to a media file' for how to link to documents and files from page text.

Document lists - creating lists of related documents

You can use the **macro** function to insert a list of all the documents in one folder while creating page content.

(See the Umbraco 7 Editors Manual p23 section 3.1.8 for instructions on inserting a macro)

1. On your page - place the cursor in the content editor box where you want to insert your macro.
2. Click the **Insert Macro** button from the toolbar to open the macro properties dialog box.
3. Select a macro to insert from the **Choose a macro** drop-down list. In this case
4. select **DocLibListing**(document library listing) as the macro
5. Click on the **+** sign to navigate to the folder you want – this will expand the document library tree available to you
6. Click on the pale grey **tree icon** to expand a folder to show subfolders.
7. Click on the dark grey **select** bar to select the folder you want all documents listed from
8. Leave the **legacy id** and **simple list** boxes blank
9. Click **Select** and then **Save>Preview** or **Save and Publish** your page

You should have a list displayed on your page which users can order by date or A-Z to suit themselves

SIGN OFF:

Now that you've completed this module, you should be able to carry out the essential tasks to allow to you manage your content. With the online support, videos and Umbraco 7 Editor's Manual, you have a vast range of materials at your disposal. More information will be provided in a moment.

For now, please enter your email address

1. to confirm that you are confident that you are equipped with the necessary skills to manage your team or department's content, and

2. that you have read and understood, and will adhere to, the terms and conditions set out in the NHSGGC Web Content Management & Development Policy

http://www.staffnet.ggc.scot.nhs.uk/Corporate%20Services/Communications/Pages/Communications_webdocs_bam_160207.aspx#policy

EMAIL ADDRESS FIELD
CONFIRM EMAIL ADDRESS

What next?

You will receive an email from the Webteam within the next few days with your username and password. Once you have these, you will be able to start editing or building your own site.

Before you start, you must read the NHSGGC corporate web policy and our guide 'Writing for the web' available on Staffnet. You should aim to achieve the standards set out in the NHSGGC accessible information policy. More on all these topics is available from the webteam pages of Staffnet under Corporate Services > Communications. We will use this page to add further training and support material over time.

http://www.staffnet.ggc.scot.nhs.uk/Corporate%20Services/Communications/Pages/Communications_webdocs_bam_160207.aspx

If you need further help or advice with editing or managing content remember to email us webteam@ggc.scot.nhs.uk, please do not log a call with the IT Helpdesk.