

CMS



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Serena Collage Content Management System

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The Serena Collage content management system (CMS) is a Web-based application that allows users to create and edit Web pages through a Web browser. Collage is a WYSIWYG (What You See Is What You Get) program, which means that you can edit Web pages like you would in a word processing program (e.g., Microsoft Word). The way the content appears in Collage is how it will end up on the Web.

Prior to using Collage, Web pages at Loyola were maintained by a small group of specialists with knowledge of HTML and Unix commands. Collage makes it possible for staff and faculty without that knowledge to update Web pages on the university site. Representatives from each department will be able to manage their respective sites.

Since the CMS uses a set of templates to create pages on the Loyola site, it also ensures that pages conform to the Web design standards set by the university. While there is room for some variation between sites, the Loyola site will present a coherent style to readers.

What Is an Asset?

You will see the word “asset” throughout this training document. It simply means any component of a Web site that Collage needs to correctly render Web pages. So in Collage, all Web pages, images and folders are assets. You will see their names listed under “asset name” in the asset list.

Before You Begin

Serena Collage is optimized for use in Internet Explorer. Some features of Collage may not work correctly or appear at all in other Web browsers.

Before logging into Collage, make sure your browser’s pop-up blocker is turned off. Pop-up windows in the CMS allow you to edit and preview your work.

Disabling Pop-up Blocker

1. Choose **Tools | Internet Options** from the IE menu bar.
2. Click the **Security** tab.
3. Click the **Internet** icon.
4. Click the **Custom Level** button. The “Security Settings” box appears.
5. Scroll down to “Use Pop-up Blocker.” Click **Disable**.
6. Click **OK | Yes | OK** to return to IE.
7. Shut down all IE windows and open a new browser window.

Logging into the CMS

When you login to the CMS for the first time, you will be asked to install and run Serena Collage software. Click **Always** or **Install** to accept the installation.

1. Go to <http://www.luc.edu/cms> in the Internet Explorer “Address” field. This will open the Welcome page. This is also the page on which we highlight issues related to CMS, like scheduled downtime, or other problems with the system. Use the link, “Click Here”, to login to the CMS.
2. The Collage login page appears.
3. Type your Loyola network ID and password in the appropriate areas.
4. Click **Login** or press **Enter**. The “Select Your Project” window appears.
5. The project is “CMS2” and this should already be highlighted.
6. Click **Open**.

Navigating the CMS

Upon logging into the CMS, you will see two tabs at the top of the page; **Home** and **Content**. **Home** is where you manage your assigned tasks if you work in a workflow. **Content** is where you do the work of creating and editing Web page content.

Beneath the tabs is the subview pull-down menu. Each subview is a page that gives you access to different Collage functions. To view the entire subview list of any tab:

1. Click the tab.
2. Click the subview pull-down menu.

OR

1. Hover the cursor over the tab until an arrow appears next to the tab name.
2. Click the arrow.

To get to your school or department’s Web pages:

1. Click the **Content** tab, **Contribution** subview.
2. Under “Asset Name,” click the name of your site.

Notice the button bar under the tabs. You will use the options on this button bar to complete a large part of your work in the CMS.

Creating a New Document

To create a new page on your Website, you must create a new document in Collage.

1. Click the **New Document** button. The “New Document” window appears.
2. Choose the type of document you want to create from the “Select document type:” pull-down menu.

Note: The vast majority of the pages you will create will be the “Standard Document” type of file.

3. Give the document a name in the “Name:” field.

Note: The document's name is not the same as the title of the page. Please limit the name of your document to two or three key words. We advise using only lower case letters and no spaces. If you do need a space, you can use an underscore “_” to connect the words.

4. You may type a description of the document in the “Description:” field, if you wish, but this is optional.
5. Click **OK**. The document appears in a new window ready to edit.

Creating a new document automatically checks out that asset to you, which prevents other Collage users from editing the asset. Saving and exiting the document checks in the asset.

Editing an Existing Document

To edit an existing document, you must first check it out. Checking out an asset prevents other users from editing it. No one can make conflicting edits to an asset while you have it checked out.

Checking out an Asset

1. Click the check box next to the asset.
2. Click the **Check Out** button. Your username will appear next to the filename in the “Checked Out” column of the asset list. You can also check out and open a document for editing by clicking directly on the asset name.

Because other users may need to work on the same asset in the future, remember to check it back in when you finish making changes.

Checking in an Asset

1. Click the **Save** button to save your work.
2. Click **OK**.
3. Click the **Exit** button to close the asset window.

This should Check In the asset. If you need to manually Check In an asset, follow these steps:

1. Click the check box next to the asset.
2. Click the **Check In** button. The **Check In:** window appears.
3. In the “Check In comment:” field, you may type a comment about the changes you made to the asset, but this is optional.
4. Click **OK**.

Undoing a Check Out

If you did not make any changes, or if you do not want to save the changes you made to the asset, do not check the asset back in. Instead, you should undo the check out.

1. Click the check box next to the asset.
2. Click the **Undo Check Out** button.
3. Click **OK | OK**.

Adding Text

Collage provides three fields into which you can enter text; the **Title** area, the **Sub-Title** area and the **Content** area. You can type text directly into the fields or copy and paste text from another source such as a Word document or another Web page.

Tip: If you're copying from Word, we advise that you first copy and paste the text into Notepad, then copy it from Notepad into CMS. Notepad removes most of the extra code placed by Word.

Tip: Keep the title of your page short and to-the-point, especially if it is going to show up in the site's main navigation. You do not need to reiterate the name of your department because that information is already on the page. Confine the title of your page to one or two key phrases.

Adding Text to the Title, Sub-Title and Content areas.

When you place text into the Title area, it will be converted to uppercase and maroon color. When you place text into the Sub-Title area, it will be converted to maroon color.

The Content Area

There are more options in the Content area. You can type as you normally would and select style variations, such as Bold and Italics by using the button bar at the top.

Creating a Bold Header

To mark the beginning of a new section of text, you should create a section header.

1. Place your cursor at the beginning of the section.
2. Press **Shift+Enter** to create a new line.
3. Place your cursor at the beginning of the new line and type the header.
4. Highlight the header.

Note: It works best to highlight from the end of the line to the beginning.

5. Click the Style button and choose "bold."

Creating a Bulleted List

A bulleted list at the top of the page helps your readers know what information is available on the page. Create a bulleted list that includes anchor links to each header on the page.

1. Type the name of each section header. Press **Enter** after each line.
2. Highlight the entire list and click the **List** button.
3. Choose - **type Circle**.

To add an item to an existing bulleted list:

1. Place the cursor at the end of any bulleted item.
2. Press **Enter**.

Adding an Image

To include an image on your site:

- Your site must include an images folder.
- You must upload the image to that folder.
- You must insert the image into a page.

Uploading an Image

Each site should contain an images folder. If your site does not, contact the Web Team (cms@luc.edu) and we'll create one for you. Before beginning this step, make sure the image you want to upload is available on your computer, either on the hard drive or on a removable information storage device (e.g., disk, CD, data stick).

1. Click the name of your images folder.
2. Click the **Upload** button.
3. Click **Browse...**
4. Locate the image file you want to upload on your computer or storage device.
5. Double-click the image's filename, or click the filename and click **Open**.
6. Click **OK**. The image will appear in the asset list.
7. Approve the image by clicking the icon to its right in the "Modified Version" column.

Inserting an Image

1. At the top of the **Content of** list, click the name of the site to return to the site's main folder.
2. Click the asset name of the page where you want to insert the image.
3. Place the cursor where you want the image to appear.
4. Click the **Image** button. The **Insert Image** window appears.
5. Locate the image in the list and place a check in the box next to the image.
6. Leave the **Constrain proportions** option checked. Choose the width or height of the image. Collage will automatically change the other dimension to keep the image from becoming distorted.
7. If you wish, you can add a "Border". Enter a number between 1 and 4..
8. From the "Align:" pull-down menu, choose how you want to align the image on the page.
9. If you are inserting the image into text, create a small pad between them. Type **4** in the field that creates space on either side of the image.
10. In the "Alt:" field, type a short (two-to-three word) description of the image.
11. Click **OK**.

Editing Image Properties

If you've already placed an image and want to change it's properties, follow these steps:

1. In edit mode, select the image by clicking once on the image.
2. Click the **Image** button.
3. Make changes to the image's properties. If you are changing the dimensions of the image, make sure the Constrain Proportions option is checked.
4. Click **OK**.

Removing an Image

1. In edit mode, click the image.
2. Press the **Delete** key.

Adding a Link

There are 3 types of links in the CMS system; internal, external and anchor. An **Internal Link** is described as a link to any other asset that you have access to edit. An **External Link** is done for any page or asset that you do not have access to edit, whether it's a Loyola page or an off-site page. An **Anchor Link** is a link to another area on the same page.

To add an **Internal Link**:

1. Highlight the text you want to link.
2. Click the **Link** button. The **Insert Link** window opens.
3. Click the **Internal** tab.
4. Click the plus sign next to the LUC folder.
5. Click the name of the folder that holds the page you want to link to.
6. In the right pane of the window, click the name of the page you want to link to.
7. Click **OK**.

To add an **External Link**:

1. Highlight the text you want to link.
2. Click the **Link** button. The **Insert Link** window opens.
3. Click the **External** tab.
4. Click the **New Link** button and type in the name of the link and its URL. Click **OK**.
5. Type in or edit the name of the link in the "Text:" field, if needed.
6. Click **OK**.

To add an **Anchor Link**:

An anchor link links to a specific spot on a Web page. Anchor links can be used to focus the audience's attention to a particular piece of information on your site. Creating an anchor link consists of two steps:

Step 1: Insert an anchor in front of the information you want to link to.

Step 2: Create a link to that anchor.

To insert an anchor:

1. Place the cursor where you want the anchor.
2. Click the **Anchor** button and select **Insert/Edit Anchor**.
3. Type a name for the anchor and click **OK**.

To link to an anchor on the same page:

1. Highlight the text you want to link to the anchor.
2. Click the **Link** button.
3. Choose the **Current Page** tab, and then click the name of the anchor you just created.
4. Click **OK**.

To link to an anchor on another page in the same site:

1. Highlight the text you want to link to the anchor.
2. Click the **Link** button. The **Insert Link** window appears.
3. Click the **Internal** tab.
4. In the right pane of the window, click the name of the page where the anchor appears.
5. Click the **Local Anchors** button.
6. Choose the anchor from "Anchor:" drop-down list.
7. Click **OK**.

Removing a Link

1. Highlight the linked text.
2. Click the **Link** button.
3. Click **Unlink**.

Tables

Tables in Collage do not work exactly the same way as they do in Microsoft Word. For instance, you cannot **Tab** from one cell to another. You also may not copy an entire row to another row; instead, you must copy each cell individually. Table functions are accessed from the **Table** button at the top of the screen.

Inserting a Table

1. Place the cursor where you want the table to appear.
2. Click the **Table** button and choose **Insert/Edit Table**.
3. Type the number of columns and rows you want in the table. You can add and remove columns and rows later. You can adjust Cell Spacing, Cell Padding and Borders if you wish.
4. To create table headers in the top row, check the box next to "Build first row using header cell tags." Table headers appear in white text on a maroon background.
5. Click **OK**.

Editing a Cell

1. Place the cursor in the cell you want to edit.
2. Type or delete as you would in a word-processing program.

Adding a Row or Column

1. Place the cursor in the row or column near the one you want to add.
2. Click the **Table** button and choose **Insert Row** or **Insert Column**. From this window you can choose the placement of the new row or column; i.e., above, below, left or right.

Deleting a Row or Column

1. Place the cursor in the row or column you want to delete.
2. Click the **Table** button and choose **Delete Row** or **Delete Column**.

Saving a Document

To save a new or edited document, click the **Save** button, and then click **OK**. You may want to save your work periodically to ensure that it is not lost in the event of a system failure.

Previewing a Document

Click the **Preview** tab to see how a document will appear on the Web. If you would like to make changes, click the **Edit** tab, and you will return to the Edit mode. You can also use the Preview window to verify that your links are working as expected.

Approving an Asset

Once your page is complete, you are ready to publish your document to the Web as a new Web page.

1. Click the **Exit** button to return to the asset list.
2. Locate the document you just created or edited.
3. Click the icon to the right of your document in the “Modified Version” column.
4. Click **OK | OK**.

Make sure you approve all images and PDFs also. Once all the components of a page are approved, they will be deployed to the Loyola Website. Generally, you’ll be able to view the “live” page within an hour. However, there are times when it takes longer. This is dependent on the amount of pages that are being deployed at that time.

To view the “live” page on the Loyola Website, open another Internet Explorer window and type in the URL of the page. The URL will look like this: <http://www.luc.edu/site/file.shtml> where “site” is the name of the folder in which you created the new document and “file” is the name you gave the document when you created it, followed by the “.shtml” extension. You can also find the name of the file in the “File Name” column of the asset list.

Setting Metadata

Each page in CMS contains information that indicates what kind of page it is and how it relates to other pages on your site. This information is called metadata. Navigation is controlled by metadata. You can assign metadata to pages that you create.

1. Click the **Metadata** button on the “Edit” button bar.
2. If you have not saved your document yet, CMS will ask you if you want to save changes. Click **Yes | OK**. The “Metadata” box appears.
3. You can set up to four pieces of metadata for your document:
 - *Page Group*: You can group several of your pages together in the same Page Group, by choosing the desired option from the drop-down list. Repeat this step for each page you want to include in this Page Group.
 - *Include Navigation Bar*: If you want to include your page in navigation (below) change this setting to Yes.
 - *Include in Main Navigation*: The main navigation for your site refers to the 4 main categories that appear in red on your index page. The 5th column, News and Events, is standard to all Loyola pages. If you choose “Yes”, the title of this page will appear as one of the main headings on your index page. You should only select 4 pages to appear as Main Navigation pages.
 - *Include in Navigation*: If you choose “Yes” to Include in Navigation, a link to the page will be placed in one of the columns on your index page. The title of the page will appear as the link text on the index page. Be sure to select the appropriate Page Group to match the Main Navigation (red) heading.
4. When you have finished setting the metadata for your document, click **OK | OK** to save your changes.
5. Approve the page.

Page Groups:

To see which documents belong to which page group, add a “page group” column to your CMS view:

1. Click the Preferences link in the upper right corner of the CMS window.
2. The User Preferences window opens. Click on the Content List link in the left pane.
3. Fine the first Metadata line.
4. To the right of Metadata choose **Yes** in the Show column.
5. On the same Metadata line, type **page group** in the field under Metadata name.
6. Click the Apply button.

Tips and Tricks

Deployment: In order for assets to deploy to the live web server, remember they must be checked in and approved.

Deleting an asset: If you delete a file, image or PDF from CMS, please contact cms@luc.edu. You can delete the asset from CMS, but there are additional steps we need to take to be sure it's removed from the live web server.

Browser: CMS works best in Internet Explorer on Windows and Mac operating systems. Some features may appear different, or not at all, in other browsers.

Document Type: Choose the “Standard Document” type for new files you create in CMS

Document Name: Choose a name that is short. Use all lowercase letters and do not use spaces. If you need to separate words, use an underscore instead of a space.

Editing HTML Code: To edit the HTML code of any document, click on the Source tab. If you see more than one “body” field, make your edits in the last one. Changes made to the code in the other “body” fields won't be saved.

Uploading new copies of Images or PDF files

When you want to replace an image or PDF file with a new one, **do not delete the old one**.

You will need to **replace** it. To do so, follow these instructions:

1. Click the check box next to the file you want to replace.
2. Click the **Upload** button.
3. The Upload window appears. Click the **Browse** button.
4. Click the file you want to upload and click **Open**.
5. Click **OK**.

CMS will automatically update any links to the asset. Use these instructions for all other files that do not end with .xml, including: .jpg, .gif, .ppt, .xls and .html. To edit a file that ends with .xml, click the name of that file and make changes to the content.

Web Team Contact Information:
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