# Table of Contents:

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>i.</td>
<td>Training objectives</td>
<td>3</td>
</tr>
<tr>
<td>ii.</td>
<td>User manual formatting conventions</td>
<td>3</td>
</tr>
<tr>
<td>iii.</td>
<td>Quick Reference</td>
<td>4</td>
</tr>
<tr>
<td>Sec. 1</td>
<td>Getting started</td>
<td>5</td>
</tr>
<tr>
<td>1.1</td>
<td>What is a CMS?</td>
<td>5</td>
</tr>
<tr>
<td>1.2</td>
<td>Accessing the CMS</td>
<td>5</td>
</tr>
<tr>
<td>1.2.1</td>
<td>Operating systems and browsers</td>
<td>5</td>
</tr>
<tr>
<td>1.2.2</td>
<td>Opening the CMS</td>
<td>5</td>
</tr>
<tr>
<td>1.2.3</td>
<td>Logging in</td>
<td>5</td>
</tr>
<tr>
<td>1.3</td>
<td>Dashboard tab</td>
<td>6</td>
</tr>
<tr>
<td>Sec. 2</td>
<td>Getting acquainted with the user interface (the CMS Client)</td>
<td>8</td>
</tr>
<tr>
<td>2.1</td>
<td>Site tree (Site pane)</td>
<td>8</td>
</tr>
<tr>
<td>2.2</td>
<td>Assignments pane</td>
<td>8</td>
</tr>
<tr>
<td>2.3</td>
<td>Search pane</td>
<td>9</td>
</tr>
<tr>
<td>2.4</td>
<td>Edit pane</td>
<td>9</td>
</tr>
<tr>
<td>2.5</td>
<td>Page View tab</td>
<td>10</td>
</tr>
<tr>
<td>2.6</td>
<td>History tab</td>
<td>10</td>
</tr>
<tr>
<td>2.7</td>
<td>CMS toolbar</td>
<td>11</td>
</tr>
<tr>
<td>2.8</td>
<td>Page properties</td>
<td>12</td>
</tr>
<tr>
<td>Sec. 3</td>
<td>Working with your content in the CMS</td>
<td>14</td>
</tr>
<tr>
<td>3.1</td>
<td>Introduction to workflow</td>
<td>14</td>
</tr>
<tr>
<td>3.1.1</td>
<td>Transitions and workstates</td>
<td>14</td>
</tr>
<tr>
<td>3.1.2</td>
<td>Advance button</td>
<td>14</td>
</tr>
<tr>
<td>3.1.3</td>
<td>Working with others in the General workflow</td>
<td>14</td>
</tr>
<tr>
<td>3.1.4</td>
<td>Assigning to groups</td>
<td>15</td>
</tr>
<tr>
<td>3.1.5</td>
<td>Page properties and workflow</td>
<td>15</td>
</tr>
<tr>
<td>3.1.6</td>
<td>Page creation rules (PCRs)</td>
<td>16</td>
</tr>
<tr>
<td>3.1.7</td>
<td>Workflow types</td>
<td>16</td>
</tr>
<tr>
<td>3.2</td>
<td>Edit existing pages</td>
<td>17</td>
</tr>
<tr>
<td>3.3</td>
<td>Create a new page using page creation rules</td>
<td>18</td>
</tr>
<tr>
<td>3.3.1</td>
<td>Create a new page from the Dashboard tab</td>
<td>18</td>
</tr>
<tr>
<td>3.3.2</td>
<td>Create a new page using the New button on the toolbar</td>
<td>18</td>
</tr>
<tr>
<td>3.3.3</td>
<td>Create a new page using the context menu</td>
<td>18</td>
</tr>
<tr>
<td>Section</td>
<td>Topic</td>
<td>Page</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>3.3.4</td>
<td>Creating a new page, step by step</td>
<td>19</td>
</tr>
<tr>
<td>3.3.5</td>
<td>Create a new page using Copy</td>
<td>20</td>
</tr>
<tr>
<td>3.4</td>
<td>Page types and their elements/fields</td>
<td>21</td>
</tr>
<tr>
<td>3.4.1</td>
<td>Section front page type</td>
<td>21</td>
</tr>
<tr>
<td>3.4.2</td>
<td>Section front page type elements</td>
<td>22</td>
</tr>
<tr>
<td>3.4.3</td>
<td>Detail page type</td>
<td>24</td>
</tr>
<tr>
<td>3.4.4</td>
<td>Detail page type elements</td>
<td>25</td>
</tr>
<tr>
<td>3.5.1</td>
<td>Unformatted v. formatted text fields</td>
<td>25</td>
</tr>
<tr>
<td>3.5.5.1</td>
<td>Removing excess formatting</td>
<td>21</td>
</tr>
<tr>
<td>3.6</td>
<td>Editing page content</td>
<td>22</td>
</tr>
<tr>
<td>3.6.1</td>
<td>Basic editing tools in formatted text fields</td>
<td>22</td>
</tr>
<tr>
<td>3.6.1.1</td>
<td>Pasting into formatted text fields</td>
<td>24</td>
</tr>
<tr>
<td>3.6.1.2</td>
<td>Adding a hyperlink</td>
<td>24</td>
</tr>
<tr>
<td>3.7</td>
<td>Document uploading and management</td>
<td></td>
</tr>
<tr>
<td>3.8</td>
<td>Finishing your work in the CMS</td>
<td>29</td>
</tr>
<tr>
<td>3.8.1</td>
<td>Check spelling, save, and preview</td>
<td>29</td>
</tr>
<tr>
<td>3.8.2</td>
<td>Advance in workflow</td>
<td>29</td>
</tr>
<tr>
<td>3.9</td>
<td>Moving/copying pages in the site tree</td>
<td>30</td>
</tr>
<tr>
<td>Sec. 4</td>
<td>Formatting in the CMS</td>
<td>32</td>
</tr>
<tr>
<td>4.1</td>
<td>Style guidelines</td>
<td>32</td>
</tr>
<tr>
<td>4.2</td>
<td>Best practices in formatting (dos and don’ts)</td>
<td>34</td>
</tr>
<tr>
<td>4.2.1</td>
<td>Bold, italic, capitalization, headers</td>
<td>34</td>
</tr>
<tr>
<td>4.2.2</td>
<td>Link text</td>
<td>34</td>
</tr>
<tr>
<td>4.2.3</td>
<td>Photos in the sidebar</td>
<td>34</td>
</tr>
<tr>
<td>Sec. 5</td>
<td>Site publishing</td>
<td>36</td>
</tr>
<tr>
<td>5.1</td>
<td>Full publish schedule</td>
<td>36</td>
</tr>
<tr>
<td>Sec. 6</td>
<td>Frequently asked questions</td>
<td>37</td>
</tr>
</tbody>
</table>
i. Training objectives

In this course you will:
- Access the SU Law Ingeniux CMS and navigate the environment.
- Create and edit Web pages in the CMS.
- Perform basic Web page authoring tasks within workflows and learn how to work with others in workflow.
- Learn Web formatting/style guidelines.

ii. User manual formatting conventions

This user manual utilizes a number of different text and layout styles to help differentiate between the different kinds of information. Here are examples of the styles used and explanations of what they mean:

References to other sections of the user manual and CMS workstate properties are in italics. Italics are also used for emphasis and to indicate user input.

Important pieces of information come in boxes like this.

Key information is highlighted in a bold type font.

Locations within the CMS, such as the Dashboard tab or Site pane will be denoted with initial capitalization.

Words that appear on the screen in menus or forms, like File or Window, are in a similar font to these examples.

Keys that you press on the keyboard, like CTRL and ENTER, are in small caps.
iii. Quick Reference

✓ CMS login: lawcms.seattleu.edu

✓ Full site publishes start at the following times each day (and typically take 30-60 minutes to complete):

- 9:30 a.m.
- Noon
- 3:30 p.m.
- 6:00 p.m.
- 11:50 p.m.

✓ The LawXite event/announcement submission system (for submitting events to the master calendar and Docket, and announcements to the Docket) login is available here: www.law.seattleu.edu/x4089.xml

✓ Your user details for the CMS are the same as your Seattle University login and password.

✓ Contacts for help and requests:

Web Manager, Margot Walker
walkerm4@seattle.edu
For most CMS and Web-related questions and requests

Print and Web Media Manager, Ryan Barnes
barnesr@seattle.edu
For photo-related questions and requests

Communications Director, Katherine Hedland Hansen
hedlandk@seattle.edu
For news item questions and requests

Event Administration Associate Director, Rebecca O’Neil
oneilr@seattle.edu
For event, Web and docket calendar, and docket announcement questions and requests
Section 1 – Getting started

1.1 What is a CMS?

CMS stands for Content Management System and refers to the software we use to manage, update, and publish our site content. Seattle University School of Law is now using version 8 of the Ingeniux CMS (created and supported by Ingeniux, a Seattle-based company). The Ingeniux CMS is a Web-based system that you can access via an Internet browser (see browser notes below – sec. 1.2.1 p.5). The editing we do in the CMS is replicated to the live website, but in the CMS you will not be directly editing live content, so the CMS provides a measure of safety for users to perform ongoing Web updates.

All CMS pages are in XML format, which allows users to edit a page’s content without any involvement with display information (i.e., color palette, fonts, header and footer information, how the navigation looks, etc.). Style information is stored separately in stylesheets. Thus, users can use little or no formatting and create pages that have the ‘look and feel’ created by the site’s design team.

1.2 Accessing the CMS

1.2.1 Operating systems and browsers
The CMS interface used by users and administrators is referred to as the CMS Client. Currently, the CMS Client is fully compatible and approved for use with the following operating systems and browsers:

- **Windows XP/Vista/7**
  - Internet Explorer
  - Firefox v16 or earlier
  - Chrome v23 or earlier
  - Safari

- **Mac OS**
  - Safari
  - Firefox v16 or earlier

Additional browsers will be added to the supported list in future releases of the CMS product.

1.2.2 Opening the CMS
To access the CMS from an on-campus computer, open one of the supported internet browsers, type `lawcms/seattleu` into the browser’s address bar, and press ENTER. You will then encounter the Ingeniux CMS login screen.

If you have difficulty accessing the CMS login screen with just `lawcms/seattleu`, or you are logging in from a remote location, try typing the full URL: `lawcms.seattleu.edu`.

1.2.3 Logging in to the CMS
Once you’ve reached the Ingeniux CMS login screen, enter your username and password (same as your Seattle University network
username and password). You should not need to enter the seattleu domain before your username.

If working from a secure, personal computer, you may elect to check the Remember me next time checkbox to expedite future logins.

After entering your login information, press ENTER or click the Log In button. The Ingeniux splash screen will appear while the CMS loads into your browser. You will not be prompted to download anything.

### 1.3 Dashboard tab

When you first access the CMS, the Dashboard tab appears in the right-hand pane and provides a brief snapshot of content management and system information. The Dashboard has three columns: Create Content, Quick Links, and Site Status.

The Create Content column of the dashboard contains two sections relevant to CMS users: New and In Progress.

In the New section of the Dashboard, you will see “Wizards for creating new content” and a list of page creation rules (see sec. 3.1.5, p. 15). These rules tell the CMS where in the site to create a new page and which page-type to use. Page creation rules are created by the Web manager and correspond to the page type(s) designed for the section of the site you will be managing.

Note: You may return to the Dashboard at any time by clicking on the Dashboard button on the far left side of the CMS toolbar or by clicking on the Content Store at the very top of the site tree (see sec. 2.1, p. 8) in the Site pane.
**Important:** You may see several extra page creation rules in the new area of the dashboard, most having to do with Xite/event creation or the library. Do not attempt to create content with these rules. Simply ignore them. If you accidentally use one of these rules, contact the Web manager.

The **In Progress** section of the dashboard displays pages currently assigned to you for active editing.

The **Quick Links** column of the dashboard offers a few conveniences to users by allowing them to add favorite pages (i.e., frequently edited pages) and to view recently visited pages.

The **Favorites** section lists pages that users would like to be able to access quickly (i.e., pages that are edited often). To add a page to the list, find the page in the site tree (see sec. 2.1 under 'Site Tree,' p. 8 on locating the site tree) and then drag it into the Favorites area of the dashboard. To remove a page from the list, click the x beside its listing.

The **Recently Visited** section lists pages that the user has recently viewed.

The **Site Status** column of the dashboard contains information that may be interesting to CMS users but is really only important for the Web manager.

Note: In the case of the Seattle University School of Law CMS, the list of users includes persons in the group who have anytime accessed the event and announcement request form for posting to the calendar and docket. Thus, the Active Users and CMS Statistics sections list more total users than those who are trained CMS authors and editors responsible for managing actual sections of the website.

The **Active Users** section lists anyone currently logged into the CMS. This can be helpful if you share a workflow with other people and would like to know if they are currently logged into the system.

The **Publish Status** section displays the date and time the last publish completed (the last publish of any kind, not necessarily full publishes) and the number of pages published.

The **CMS Statistics** section displays the version of CMS software the site is using, the total number of pages (published and unpublished) in the site, and the number of users with access.
Section 2 - Getting acquainted with the user interface

2.1 Site tree (Site pane) – left column of the CMS

The site tree is located in the left column view of the CMS and can be found by clicking on the Site pane.

The entire website is set up in a hierarchical structure in the site tree, and CMS users will find that they have access to one or more specific sections of the website within this structure (most sections will look grayed out, indicating read-only access, but your given section will be bold in the site tree).

Expand Content Store and Site Folder in the Site pane by clicking the expand button—the plus (+) to the left of each—to view the contents of the site tree. If you further expand the Home page hierarchy by clicking on the + button(s), you will see the major sub-content of the site—all sections that are linked to directly from the Home page. This reinforces the idea that what you see in the Site pane is the navigational structure of the law school website, especially the deeper you go in the site tree. This structure also affects the URL of each page (see sec. 3.7 under ‘How our URLs work,’ p. 31).

When you click on a page in the site tree, it will display in the right-hand Edit tab (see sec. 2.4, p. 9).

2.2 Assignments pane – left column of the CMS

The Assignments pane lists all pages and components currently assigned to the user and in the Editing working state (see sec. 3.1, p.14 on workflow). This means only items that are currently checked out to the user (i.e., in the Editing workstate) will be displayed, rather than all of the items that the user is responsible for maintaining.

Clicking on an item in the Assignments list will display the selected item in the Edit tab on the right. Note that this functionality is the same as the In Progress section on the Dashboard tab (see sec. 1.3, p. 6).
2.3 Search pane – left column of the CMS

Accessed via the Search pane in the left column accordion menu, this feature searches text fields within the pages and components in the CMS and can be configured to search for recently deleted pages and previous versions of pages.

To search, enter keywords or queries in the search field. Queries follow the syntax field:value and can be joined by and/or. For example, search for the term academics in a page’s Title field or Abstract field by entering: title:academics or abstract:academics.

A few details to keep in mind about the search functionality:

- Search is not case sensitive.
- Only whole and hyphenated words are searchable. The strings “academics” and “academic-s” will return pages with the word academics in them. But “aca” or “academic” will not return academics.
- There may be up to a ten-second delay between content updates and indexing.
- A search will only return the 200 highest-ranked matches.
- The search results table can be sorted by column, in ascending or descending order.

To open the advanced search options, check Advanced. With advanced searching enabled, you can choose to search checked-out pages, recently deleted pages, and previous versions of pages. The Page Type and Field drop-down menus are not currently configured for the law school site.

The Go to field on the CMS toolbar provides quick search functionality by xID (see sec. 2.8, p. 12 for definition of xID) or page name. (See sec. 2.7, p. 11 for more about the Go to field).

2.4 Edit pane

The majority of the CMS is taken up with the edit pane—the right-hand portion of the CMS—which has three tabs: Edit, Preview, and History. All editing work will be done in the Edit tab, as one might expect. However, even if you’re viewing the Edit tab, you must advance the page to the Editing workstate before you can make edits (see sec. 3.1, p. 14 on workflow).

Note that what you see in the Edit tab looks very little like what you see on the live website. The information is the same, but the look is different. What you see in the Edit tab is XML fields containing text content without the display information, or template, applied. This is what you’ll be responsible for editing. The Preview tab (see next section) will display your data as it will appear on the live website.
2.5 Page View tab

The Page View tab in the Edit pane displays the selected page with the stylesheet or template applied—as it would be on the live website. The nice thing about the Page View tab is that you can test your new content or edited content before you submit the page for publish to the live website—where everyone could see if you have layout problems or broken links on your page. Thus, it gives you a great opportunity to correct mistakes or change your mind about formatting that isn’t quite right. You can switch back and forth between the Edit and Page View tabs, making changes and then checking to see the results. Since we’re working in a Web browser, what you see in the Page View tab really looks and works the same way the page would look and operate on the live website in almost all cases.

The only limitation to the Edit/Page View relationship is on password protected pages and components. Page View is disabled when pages are password protected. (For more information about password protection, see sec. 6, p. 42 ‘FAQ – I have a page that needs password protection...’.)

You may also preview your page in a separate window by clicking the Preview button on the CMS toolbar (see sec. 2.7, p. 11).

2.6 History tab

The History tab is only intended for use in special cases but can be very useful when needed. Every time someone edits a page and then advances it to publish, the CMS saves a historical version of that page. We currently save the seven latest versions of the page.

When might this be helpful? What if you’ve made changes to a page then realize none of those changes can go live until the next month, or that you’re simply not happy with your changes and need to start over? Instead of manually going through and trying to find every change you made to the page, you can click the History tab, select the version prior to your changes, revert to that saved version, and resubmit it. It can serve as a large-scale Undo button.

Always plan carefully for major edits before implementing them. If you absolutely must revert to a previous version of a page, make sure the page is in the Editing workstate, locate the older version on the History tab, and click Revert to the selected version. This action cannot be undone.
2.7 CMS Toolbar
The toolbar resides along the top margin of the browser and, for most users, will look something like this:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign-Out</td>
<td>Provides an easy way to log out of the site.</td>
</tr>
<tr>
<td>Language</td>
<td>Displays a drop-down menu to select the interface language for localization. The CMS detects the browser language setting automatically.</td>
</tr>
<tr>
<td>Help</td>
<td>Launches the client Help window. In this application, users will find documentation on how to use the CMS Client. For specific SU Law implementation questions, however, please contact the Web manager.</td>
</tr>
<tr>
<td>Go to Page</td>
<td>Provides an input field for locating pages or components in the site by entering a page xID, a page name, or using the dropdown to select from a list of previously entered pages. Type x and the ID number for the page (see sec. 2.8 p. 12), or the first few letters of the page name, and a drop-down will appear from which you may select your page. The CMS will then take you to the page in the site tree.</td>
</tr>
<tr>
<td>Go To</td>
<td>Loads the information for the page entered in the Go to Page drop down (if not already loaded).</td>
</tr>
<tr>
<td>Back</td>
<td>Provides the option to load a prior page based on past selected pages.</td>
</tr>
<tr>
<td>Forward</td>
<td>Provides the option to load a page loaded after the current page based on past selected pages.</td>
</tr>
</tbody>
</table>

The lower portion of the toolbar contains a few simple buttons:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td>Loads the Dashboard tab (see sec. 1.3, p. 6).</td>
</tr>
<tr>
<td>New</td>
<td>Allows the user to create a new page or component, depending on the user’s permissions and access to the selected location in the site tree (see sec. 3.4.3, p. 24).</td>
</tr>
<tr>
<td>Save</td>
<td>Commits changes made to the current page in the Edit tab without checking the page in.</td>
</tr>
<tr>
<td>Check Out</td>
<td>Checks the selected page or component out of the system so it can be edited. (Users operating in workflows do not have access to this button.)</td>
</tr>
<tr>
<td>Check In</td>
<td>Checks the page or component into the system and saves the changes made. (Users operating in workflows do not have access to this button.)</td>
</tr>
<tr>
<td>Rename</td>
<td>Launches the Rename dialog to rename the selected item in the left navigation listing. Does not impact the Title field in page content. Renaming directly affects the page URL—renaming new pages prior to publish is fine, but the Web manager should be contacted about renaming any existing pages that have already been published. (See sec. 3.7, p. ?? under 'How our URLs work' on how page names affect URL structure.)</td>
</tr>
<tr>
<td>Assets</td>
<td>Launches the Manage Assets dialog for uploading, managing, and referencing documents, images, and other static files (see sec. 3.7, p. ??).</td>
</tr>
</tbody>
</table>
Assign To
Launches the Page Assignment dialog to change the selected item’s user assignment, provided the user has sufficient permissions. This is intended for handing a page to another user while keeping it in the same workflow workstate. You will also use the Assign To button to assign a page to yourself before Advancing to Revise (see sec. 3.1.3, p. 14).

Advance in Workflow
Launches the Advance Page in Workflow dialog for moving a page or component to the next step of a workflow. This is the primary button for interacting with pages for all users operating in workflows.

Refresh
Reloads the information in the CMS. Remember, you are working in a browser and data may have been updated by someone else while you were viewing the current page. It is good practice to refresh and save often, especially if you are working in a section with other users.

2.8 Page properties

At the top of each page on the Edit tab you can find the Page Properties bar. It displays a collection of information about a page. These properties include the person to whom the page is assigned as well as the workstate and group that currently “owns” the page. The last workflow comment shows up here, giving context to what the current assignee may be doing, or be expected to do, with the page.

To view page properties:

1. Access the desired page in the Site Tree and view the Edit tab on the right side of the CMS window.

2. Expand the Page Properties section at the top of the page.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Name</td>
<td>Displays the name of the page given in the site tree. This name is related to both site navigation and page URLs (see sec. 3.8, p. 31 for important cautions).</td>
</tr>
<tr>
<td>Schema</td>
<td>Indicates page type (template) used to create the page.</td>
</tr>
<tr>
<td>ID</td>
<td>(aka: xID) Distinguishes page from all others in site. This unique number is assigned sequentially upon page creation.</td>
</tr>
<tr>
<td>Assigned To</td>
<td>Identifies user to whom page is currently assigned.</td>
</tr>
<tr>
<td>Created</td>
<td>Displays date and time when page was created.</td>
</tr>
<tr>
<td><strong>Created By</strong></td>
<td>Indicates which user created the page.</td>
</tr>
<tr>
<td>---------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td><strong>Last Modified</strong></td>
<td>Displays date and time when page was last checked in (i.e., advanced to the Publish workstate, see sec. 3.1, p. 14 on workflow).</td>
</tr>
<tr>
<td><strong>Last Modified By</strong></td>
<td>Indicates which user last checked in the page (i.e., who last advanced the page to the Publish workstate, see sec. 3.1, p. 14 on workflow).</td>
</tr>
<tr>
<td><strong>In Workflow</strong></td>
<td>Indicates which workflow the page/component is in.</td>
</tr>
<tr>
<td><strong>Last Transition Comment</strong></td>
<td>When a page is advanced in the workflow, the user advancing it has the option of leaving a comment for the next person the page is assigned to (can be extremely helpful when multiple people are working in the same section).</td>
</tr>
<tr>
<td><strong>Current Workstate</strong></td>
<td>Indicates the current workstate in the workflow (i.e., Editing, Publish, etc.)</td>
</tr>
<tr>
<td><strong>Current Work Group</strong></td>
<td>Indicates the user group involved in the workflow in its current workstate.</td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>Specifies when the page will be available on the live site. (SU Law is not currently using this option.)</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>Specifies when the page will no longer display in the live site. (SU Law is not currently using this option.)</td>
</tr>
<tr>
<td><strong>Publish As</strong></td>
<td>Displays a friendlier name for the page URL. (SU Law is not currently using this option.)</td>
</tr>
</tbody>
</table>
Section 3 – Working with your content in the CMS

3.1 Introduction to workflow

Workflow—the programmed process of moving a page from creation to publication in the CMS—is created as a set of workstates, connected by bundled authoring actions called transitions.

3.1.1 Transitions and workstates
A workstate is the name given to describe a condition a page may be in or the type of work to be done on a page (for example, typical workflows have Editing and Publish workstates).

How to find out which workstate a page in your section is in:

1. Click on the page in the site tree and view it in the Edit tab.
2. Expand Page Properties at the top of the Edit tab view.
   
   One of the properties listed is Workstate and you’ll see the page’s current workstate listed. You can also see who the page is assigned to and other details (see sec. 3.1.5, p. 15).

Transitions are the bundles of actions involved in the movement of a page from one workstate to another and often describe, in action verbiage, the next workstate the page will enter if you execute the transition. For example, the transition between Editing and Publish is usually Submit for Publish and the transition from Publish to Editing is often called Revise or Assign page back for revision.

3.1.2 Advance button
The Advance button in the toolbar is the central tool for moving pages from one workstate to another. The button launches the Advance Page in Workflow dialog, which lists next steps for a page based on its current workstate and next users who the page can be assigned to when advanced to the next workstate.

3.1.3 Working with others in the General workflow: using the Assign to button
If you are working in the General workflow with other users in your section, you must regularly check page properties (see sec. 3.1.5, pg 15) before interacting with pages in your section. Check the Assigned to portion of Page Properties to find out who the page is assigned to and then check the Workstate portion to find out which workstate the page is in. If the page is in the Editing workstate, do not proceed with any action on the page. The person the page is assigned to has likely made changes to the page, which are saved locally until that person Advances the page, and their work can be lost by another user taking control of the page via the Assign to button.
You are only safe to interact with a page assigned to another user if that page is in the *Publish* workstate (meaning changes to the page have been checked in) or if the assigned user saves their work and assigns the page to you. When in doubt, contact the person the page is assigned to and ask them to assign it to you when they’ve completed their work.

If a page is in the *Publish* workstate assigned to another user, you must first **assign the page to yourself** before you can execute workflow transitions on the page:

1. Click the **Refresh** button on the CMS toolbar, then check page properties again to make sure the page is still in the *Publish* workstate.
2. Click the **Assign to** button on the CMS toolbar and choose yourself from the list of users.

With the page now assigned to you, you may click the **Advance** button on the CMS toolbar to execute the workflow transition that will move the page to the *Editing* workstate (usually *Revise*).

Remember to advance the page to the publish workstate when you’ve completed your work and assign the page to its likely next editor.

### 3.1.4 Assigning to groups

To assign a page to a group, select **All users in the group** when in the Select User dialogue while Advancing the page in workflow.

The Assign to Group feature assigns pages to an entire user group instead of an individual user. When a page is assigned to a group, all users in the group will see the page on their assignment lists. A user can claim the page using the **Assign to Me** button on the **Edit** form. The page will then be assigned to that user and not the group as a whole. Only after a user claims the page can she or he make changes. Once the page is claimed by an individual user, it will no longer be assigned to the group as a whole.

### 3.1.5 Page properties and workflow

Page properties play a central role in providing workflow information.

Recall from section 2.8, *Page Properties*, the following details available in each page’s Page Properties bar (top of page when viewing page in edit tab):

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assigned To</strong></td>
<td>Identifies user or group to whom page is currently assigned.</td>
</tr>
<tr>
<td><strong>In Workflow</strong></td>
<td>Indicates which workflow the page is in.</td>
</tr>
<tr>
<td><strong>Current Workstate</strong></td>
<td>Indicates the current workstate within the page’s current workflow (e.g., Editing, Publish, etc.).</td>
</tr>
</tbody>
</table>
Current Work Group  Indicates the user group involved in the workflow in the page’s current workstate.

Last Transition Comment  When a page is advanced in the workflow, the user advancing it has the option of leaving a comment for the next person the page is assigned to (can be helpful when multiple people are working in the same section).

If a user ever wonders where a page may be in a workflow, who it is assigned to, or whether the last user to advance the page might have left an important comment, the Page Properties bar at the top of each page is the place to look for this information.

It is important to frequently use the orange Refresh button on the CMS toolbar (see sec. 2.7, p. 11) to make sure you are viewing the latest version of the page in question and, thus, viewing its most current page properties.

3.1.6 Page creation rules (PCRs)
By default, new Web pages can be created anywhere in the site tree. However, pages should be created within the context of the predefined site information architecture. This helps ensure site visitors can locate pages where they expect to find them.

To help preserve the integrity of the site, administrators define page creation rules, or PCRs, that restrict where users can create new pages. Page creation rules for use by the person logged in are listed on the Dashboard’s New section. Because these rules are group membership based, different groups of users will see different lists of rules. In general, users should use the Detail Page PCR in almost all cases.

3.1.7 Workflow types
There are two basic workflow types that you may find yourself working with in the CMS.

The most common is the General workflow. The workstates within the General workflow are:

<table>
<thead>
<tr>
<th>Publish (workstate):</th>
<th>Revise (transition)</th>
<th></th>
<th></th>
<th>Editing(w):</th>
<th>Submit for Publish(ť)</th>
<th></th>
<th>Publish(w)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove from live site publishing (transition)</td>
<td></td>
<td></td>
<td>Unpublish(w):</td>
<td>Edit this unpublished page(ť)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Important:
If you find that you want to revise a page but your only transition option is Advance to publish, simply select that transition then click the Advance button again and Revise should now be available.
Another workflow you might use is the General Approval workflow, which is used in sections where student workers are primarily responsible for Web updates. This workflow requires that a student user submit their new pages or page revisions through a supervisor, and the supervisor must then submit the page for publish. The transitions and workstates within the General Approval workflow are:

![General Approval Workflow Diagram]

### 3.2 Edit existing pages

The majority of users will spend most of their time in the CMS editing existing, already published pages in order to update the content and keep it fresh. Accessing an existing page to make edits requires interaction with your workflow.

**How to access an existing page for editing:**

1. Click on the page in the site tree. Expand Page Properties in the Edit tab and check to see which workstate the page is in and to whom it is assigned.

   **Important:** If the page is assigned to someone else, proceed to step 2 only if the page is in the **Publish** workstate. Do not proceed if the page is in the **Editing** workstate. If the page is assigned to you, you may skip step 2.

2. If the page is assigned to someone other than you, you must first assign the page to yourself before you can advance it to the **Editing** workstate in the workflow. Click the **Assign To** button on the CMS toolbar and choose yourself or, if it is assigned to an associated group, click the **Assign To Me** button.
3. Click the Advance button on the CMS toolbar.

4. Select the workflow transition that will move the page to the Editing workstate (in most cases this transition is called Revise or Assign page back for revision). In the dialog box that appears, select the workflow transition again and then choose your own name from the Assign To list. Click Advance.

The page should then appear assigned and checked out to you and ready for editing. When you have completed your work on the page, save you work, then click the Advance button to initiate the next workflow transition (in most cases Submit for Publish). Assign the page to its next likely editor or group.

3.3 Create a new page using page creation rules

There are three ways to create new pages in the CMS: (1) using the New section in the Dashboard tab; (2) using the New button on the CMS toolbar; or (3) right-clicking in the site tree and selecting New from the context menu.

In some cases, you may also want to create a copy of a previously created page (i.e., if your new page’s content needs to be formatted in the same way as another page, and you’d like to work with a copy rather than duplicating the formatting from scratch).

3.3.1 Create a new page from the Dashboard tab

The New section in the Dashboard tab displays a list of page creation rules (see sec. 3.1.5, p. 15). Clicking on one of these rules launches a page creation wizard that will walk you through the steps of creating a new page (see sec. 3.3.4, p. ? for step-by-step instructions from this point on).

3.3.2 Create a new page using the New button on the toolbar

The New button on the CMS toolbar (at the top of the CMS interface) is also an easy way to create new pages. When you click the New button, a dropdown list appears, giving you the option to create a new folder, page, or component. Users will almost always need to select Page. Folder creation is not recommended.

Once the user has selected Page, the Create New Page dialog box will appear (see sec. 3.3.4, p. 19 for step-by-step instructions from this point on).

3.3.3 Create a new page using the context menu

Many functions in the CMS can also be accomplished by using the context menu. A context menu simply shows the user the available functions for the area where the user right-clicked. The context menu you see in the left column Site pane may be different from the context menu you see in the right side Edit tab.
You can access the context menu by clicking the right mouse button wherever you want to see the context menu.

When a user right-clicks in their section of the Site Tree, the context menu contains a New option. Select New and then select Page (a few users may need to select Component). The Create New Page dialog box will appear (see sec. 3.3.4, p. ? for step-by-step instructions from this point on).

### 3.3.4 Creating a new page, step by step

1. The page creation rules may take a few moments to load in this dialog box. Once the Select Rule information appears, select the appropriate page creation rule for the section in which you want the new page to be placed. **In almost all circumstances, users should use the Detail Page PCR.**

2. Enter the name of the new page into the Name field. When you first create a page, you are required to give it a name – which will appear in the site tree of the CMS, and in the left navigation and bread-crumb navigation of your section on the live site. The name also becomes part of the page’s URL (see sec. 3.7 under ‘How our URLs work,’ p. 31). Thus, the name should be as short and clear as possible, no more than 2-3 words.

3. Click the **Create** button. (If creating from the dashboard, click or press ENTER to create the page.)

![The Create New Page dialog in the CMS.](image)

4. Depending on how the Web manager set up the page creation rule, you may be presented with a window asking you to select
the location for the new page. Select the page that is the intended “parent” of the page you are creating.

5. The new page appears in the site map and its elements display in the Edit tab on the right.

Note: If you would like to abort the page creation process, before you get to step 4 click the Cancel New Page button that looks like a wastebasket.

3.3.5 Create a new page using Copy
Some users will find they often need to create pages that list similar text or formatting in the Body Copy field. CLE information pages are an excellent example because they usually list time, location, seminar agenda, registration details, travel information, etc., and this information should be consistently formatted across every event page. In this case, it is often easiest to create new pages by copying existing ones (and simply update the new copied page with unique details formatted in the same way as the previous page).

Important: Do not forget to change both the page name and page Title on the copied page.

To copy an existing page:

1. First select the item you want to copy so that you can see the data for that item in the right side Edit tab. In the Page Properties section at the top of the Edit tab you should see the page or link component icon.

2. Click on this icon, drag it over to the left-hand site pane, and drop it in the location where you want the new copy of the page.

Note that when dragging and dropping a page to create a copy, dropping it between two items in the list (when you see a black line) will place the page in that position between the two items. When you drop the moved item on top of another page, it will become a child, or subpage, of that item. The copied item will be automatically checked out to you and not yet marked for publish.

Although the copy is an exact duplicate of the original page, it has a new, unique xID number separate from the original item.

Important: When you copy a page that has children (subpages), the children will also be copied, often creating a lot of wasted pages (that you’ll have to ask the Web manager to delete). Thus, it is recommended that only single pages without children be copied. If you have a page with children that you would like to copy, ask the Web manager for assistance first.
3.4 Page types and their elements/fields

The two most prevalent page types in the Seattle University School of Law website are the Section Front and Detail page types. These pages have different fields and different layouts that correspond to their designated purposes within the site architecture. Detail pages are the most common in the site, and almost all users will be able to create detail pages. While users do not have rules for creating section front pages, almost all users will work with at least one existing section front page and, thus, need to understand the elements in both page types and how to edit both.

3.4.1 Section front page type

Pages that have been created with the section front page type are characterized by a large header photo and wide gray sidebar that can list information such as contact information (required to be listed first), news headlines, events, important notes, and other pieces of significant and related information.

In rare cases, as needed, some section front pages have no sidebar (i.e., if the page is used for a publication table of contents). If you have questions about your pages’ sidebars, please contact the Web manager.

Section Front page type example: CPD (www.law.seattleu.edu/careers) Note the large header photo with description beside it. Also note the wide sidebar with contact information and events.
Section front pages introduce large sections of the website (often associated with departments) and highlight or introduce content contained in lower level detail pages.

CMS users do not have the ability to create section front pages because most major sections of the site have been established, and use of this page-type is constrained by site hierarchy. Any creation of new major sections of the site, necessitating creation of a section front page, must be coordinated with the Web manager.

### 3.4.2 Section front page type elements:

<table>
<thead>
<tr>
<th><strong>Element</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>All pages in the site have an unformatted text field called Title. The title is the text that appears in large font at the top of the page. On section front pages, page titles are not available to edit. Renaming of section front pages must be authorized by the Web manager.</td>
</tr>
<tr>
<td><strong>Abstract</strong></td>
<td>The abstract field is used in some cases as a descriptor of page content and will also be used as the page description displayed in search engine results. When entering text into an abstract, anticipate that it could appear somewhere on the site or the web and make sure the text is a clear and concise description of the page's content, written in complete sentences. Do not delete an existing page's abstract content without contacting the Web manager.</td>
</tr>
<tr>
<td><strong>Body Copy</strong></td>
<td>The Body Copy area is the primary location for text that is to appear in the middle portion of the section front page. It is a formatted text field, meaning you have editing tools available to change text formatting (i.e., to add headers or links).</td>
</tr>
<tr>
<td><strong>Body Components</strong></td>
<td>Some pages have special components listed in the Body Components section of the section front page. These components are created as a special request for dynamic or repeated content. Users do not have access to edit the list of body components in their pages (most pages do not have body components). Contact the Web manager with any questions.</td>
</tr>
<tr>
<td><strong>Additional Body Copy</strong></td>
<td>The Additional Body Copy field, another formatted text field identical to the body copy, exists so that any pages that have body components can have text both above and below the component. Users are welcome to use this field if they have a need to, but in most cases the Additional Body Copy section will remain empty.</td>
</tr>
<tr>
<td><strong>Sidebar Components</strong></td>
<td>The Sidebar Components list element controls which components are listed in the sidebar on section front pages (e.g., contact information, news, events, etc.). Users must leave the contact component already in place at the top of the list for consistency across the site. If changes need to be made to a section’s contact information, contact the Web manager with the updated information. If your section front page's sidebar components list already has news and/or events components, it is recommended that you leave these components in place as they auto-populate your sidebar with links to relevant news and events. (See sec. 6 – FAQ – p. 38 for more information.)</td>
</tr>
</tbody>
</table>
The Sidebar Copy field, a formatted text field, exists so that additional information (e.g., an Important Notes section) can be added to your section front page’s sidebar. Users are encouraged to add items to their sidebars in moderation and are required to follow strict formatting guidelines (listed below) so that sidebar information is formatted consistently across the website.

If your section front does not have an auto-populating event component already in place in the sidebar, you can link to your own events after they’ve been posted to the master calendar. (See sec. 6 – FAQ – p. 40, ‘How do I add my event to the calendar and/or Sullivan Docket?’) Make sure to remove event links from your sidebar after the events pass.

Events list formatting:

Header (e.g., "Upcoming Events") = H3 (header 3)
Text will appear upper-case and underlined in the sidebar.

Event date = H5 (header 5)
Text will appear small, uppercase, and red.

Event title = H4
Link this text to the event page on the master calendar. (See sec. p. [on links].)

You may also wish to add a brief event abstract (use paragraph formatting).

News formatting (or any other additional sidebar section):

H3 = Header (e.g., “ATJI News” or “Important Notes”)
Text will appear upper-case and underlined in the sidebar.

Sub-items should be formatted as a bulleted list and each item individually set to H4 (header 4) text format. Link news items to the story under the News section.
3.4.3 Detail page type

Detail pages are, in almost all cases, the subpages (or “children”) of section front pages. Characterized by smaller sidebar photos instead of header photos (in either a narrow dark grey or wide gray sidebar), detail pages are used to build out the sub-content of a section of the website. The section front page, which serves as a parent to detail pages, introduces the section and highlights the content contained in lower level detail pages.

**Detail page type example no. 1:** Curriculum, a subpage of Academics (www.law.seattleu.edu/academics/curriculum) Note in the navigation that this page is a subpage and also note the page's narrow sidebar with narrow image.

**Detail page type example no. 2:** South Africa study abroad page, a subpage of International Programs (www.law.seattleu.edu/academics/international-programs/summer-abroad) Note in the navigation that this page is a subpage and also note the page's wide sidebar with wide photo.
3.4.4 Detail page elements:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>All pages in the site have an unformatted text field called <strong>Title</strong>. The title is the text that appears in large font at the top of the page. The <em>title</em> should usually match the page name as it is listed in the left-hand site pane, but it is not required to. When you first create a page, you are required to give it a <em>name</em> – which will appear in the site tree of the CMS, and in the left navigation and bread-crumbs navigation of your section on the live site. The name also becomes part of the page’s URL (see sec. 3.7 under ‘How our URLs work,’ p. 5). Thus, the name should be as short and clear as possible, no more than 2-3 words. However, page titles, as entered in the title field on the page itself, are not required to be identical and they can be longer, so long as they are synonymous.</td>
</tr>
<tr>
<td>Abstract</td>
<td>The abstract field is used in some cases as a descriptor of page content and will also be used as the page description displayed in search engine results. When entering text into an abstract, anticipate that it could appear somewhere on the site or the web and make sure the text is a clear and concise description of the page’s content, written in complete sentences. Do not delete an existing page’s abstract content without contacting the Web manager.</td>
</tr>
<tr>
<td>Body Copy</td>
<td>The Body Copy area is the primary location for text that is to appear in the middle portion of the detail page. It is a formatted text field, meaning you have editing tools available to change text formatting (i.e., to add headers or links).</td>
</tr>
<tr>
<td>Body Components</td>
<td>Some pages have special components listed in the Body Components section of the detail page. These components are created as a special request for dynamic or repeated content. Users do not have access to edit the list of body components in their pages (most pages do not have body components). Contact the Web manager with any questions.</td>
</tr>
<tr>
<td>Additional Body Copy</td>
<td>The Additional Body Copy field, another formatted text field identical to the Body Copy field, exists so that any pages that have body components can have text both above and below the component. Users are welcome to use this field if they have a need to, but in most cases the Additional Body Copy section will remain empty.</td>
</tr>
</tbody>
</table>

3.5.1 Unformatted v. formatted text fields

When a page is advanced to the *Editing* workstate (and thus, checked out), you will notice there are several types of fields in the Edit tab. The two you will work with most often are basic unformatted text fields, such as the Title and Abstract fields at the top of all pages, and formatted text fields like the Body Copy and Additional Body Copy field, which have editing toolbars.

Note that *unformatted text fields*, like the Title field, have no toolbars or context menu to facilitate editing how the text within them will be displayed. The display information is controlled by the stylesheet or template. All you can do is type text into the field. It is possible to enter certain HTML codes into some unformatted fields if you need to do something like italicize a portion of the title, but this capability is inconsistent across page types. Contact the Web manager to request the addition of HTML to any unformatted text fields.
The Body Copy and Additional Body Copy fields are examples of **formatted text fields**. These copy blocks hold the data that appears in the central content portion of the live Web page. The display of these fields, too, is controlled by our Web stylesheets. However, users do have a limited number of options to affect how the content within the field is displayed, including basic formatting options like bold, italics, and list formatting, as well as functions like adding a link (see sec. 3.5.1, p. 22). While the editor accepts most HTML code, only limited formatting via the editor toolbar is appropriate. Extensive HTML formatting will override the stylesheets and create inconsistency on the website.

### 3.4.5.1 Removing excess formatting

One important responsibility of all CMS users is to know how to avoid adding excess non-compliant formatting and also how to remove it if it is ever accidentally added.

To preserve the integrity of the display of a page across all computer configurations, strict HTML conventions should be observed when formatting a document. When using your formatted text field editor tools (see sec.3.5.1, p. 22) to format text typed directly into the editor, these conventions are met and there is no cause for concern.

However, problems can occur with text copied in from other sources.

**Avoiding excess formatting:**

When copying and pasting from other sources (Outlook e-mail or a Word document, for example), **non-compliant formatting** can slip into the body of a page. Most of the formatting used to change text display in Microsoft Word, for example, is non-compliant on the Web. The CMS paste functionality used in our formatted text areas can weed out most of this excess formatting. However, wise users will always paste text into a plain text editor (i.e., **Notepad**) prior to pasting into the CMS, to be sure of removal of non-compliant formatting.

---

**Important:**

**Don’t!**

Do not paste text into the CMS directly from e-mail, Word, or any other program. You might paste it in with non-compliant formatting that can cause publishing and display problems for your page or even the entire website.

**Do!**

Paste text into Notepad first, copy the text from there, then paste into the CMS and use the CMS editor tools to add any formatting needed. These plain text processors strip non-compliant formatting.

---

Usually non-compliant formatting is noticeable and users can identify its appearance as slightly “off,” but this is not always the case. A good mode of operation is to never paste anything (including text, tables, links, images, and so on) into the CMS that has been directly copied
from e-mail, Word or any other word processor. Make a habit of pasting into Notepad first, then copying and pasting into your page in the CMS.

**Removing formatting from the body of a page:**
If needed, users can remove all formatting from a page using the following steps:

1. In the Edit pane, with the page advanced to the *Editing* workstate, copy all text from the formatted text field in question. Paste this text into Notepad (you may wish to save this document to prevent any accidental loss of copy). You may need to fix line breaks after pasting.

2. Return to the CMS Edit pane and, in your formatted field toolbar, click the **HTML** button (see sec. 3.5.1, p. 22) to open the HTML editor. This button will allow you to see all the field’s text and any formatting applied to it.

3. Select everything in the HTML view by highlighting with your mouse, pressing **CTRL + A**, or right-clicking and selecting **select all**. Then delete everything contained in the HTML editor. Click **Update**.

4. Return to Notepad and copy the text that you pasted into it in step 1. (The act of pasting the text into Notepad removed formatting, so now you’re working with clean plain text.)

5. Return to the CMS Edit pane and paste your Notepad text into the formatted text field. You can then use the editor’s toolbar to add compliant formatting as needed (i.e., headers, links, etc.).

---

### 3.5 Editing page content
The CMS has been configured to offer users the editing tools compliant with our website’s stylesheets.

**3.5.1 Basic editing tools in formatted text fields**
(e.g., body copy)

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HTML</strong></td>
<td>The <strong>HTML</strong> button in the editor toolbar allows you to see everything entered in that particular field, including any HTML code. If ever deleting the contents of an entire formatted text field, it is wise to do so in the HTML view to be sure that you’ve deleted all your text and the formatting associated with it.</td>
</tr>
<tr>
<td><strong>Copy</strong></td>
<td>The <strong>Copy</strong> button will copy a highlighted piece of text from the field being edited. This text can then be pasted elsewhere if needed. <strong>Keyboard shortcut:</strong> <strong>CTRL + C</strong></td>
</tr>
<tr>
<td><strong>Cut</strong></td>
<td>The <strong>Cut</strong> button will cut a highlighted piece of text from the field being edited. This text can then be pasted elsewhere if needed. <strong>Keyboard shortcut:</strong> <strong>CTRL + X</strong></td>
</tr>
<tr>
<td><strong>Paste</strong></td>
<td>The <strong>Paste</strong> button launches the Ingeniux Smart Paste dialog (see sec. 3.5.2 on pasting). Paste your text into the smart paste box and select <strong>Use Destination Formatting</strong>. This feature is useful when copying content from within the CMS and pasting it elsewhere in the CMS. (This</td>
</tr>
</tbody>
</table>
Paste Plain Text | Clicking the **Paste as Text** button brings up the plain Smart Paste window with the option to retain linebreaks (see sec. 3.5.2, p. 24 on pasting). This option removes all previous formatting from the pasted text. Keyboard shortcut: **CTRL + V**

Undo | The **Undo** button allows users to reverse the last edit performed in the field. Note: the undo button does not function after clicking the preview tab (as the preview performs a save). To preview without losing undo functionality, use the **Preview** button on the CMS toolbar instead of the Preview tab (see sec. 2.5, p. 8). Keyboard shortcut: **CTRL + Z**

Redo | The **Redo** button allows users to reinstate an edit that was reversed in an undo action. Keyboard shortcut: **CTRL + Y**

Numbered List | The **Numbered list** button allows you to begin building a numbered list or, if you’ve highlighted text, will convert that text to numbered list format.

Bulleted List | The **Bulleted list** button allows you to begin building a list or, if you’ve highlighted text, will convert that text to unordered list format.

Link | The **link** button allows users to hyperlink highlighted text or to edit existing links (click somewhere in the link and then click the **link** button to edit link properties).

Unlink | The **unlink** button is a quick way to remove a hyperlink without losing the link text. If a word or phrase is hyperlinked and the link needs to be removed while preserving the text, simply click somewhere in the hyperlink and click the **Unlink** button.

Anchor | The **anchor** button allows users to create a page anchor that can then be linked to from a hyperlink elsewhere on the same page or from a different page. Click (do not highlight) on the left side of the text that should be anchored. Then click the **Anchor** button and type in the desired link name (no spaces). Note: this link is public, so keep the text clear and appropriate. (See sec. 3.5.4, p. 24 for more details on using anchors and in-page links.)

Find | The **find** button helps you to search the field for a particular word or phrase. This is helpful if you are working with a large page of text and need to find a particular section quickly. Keyboard shortcut: **CTRL + F**

Replace | The **replace** button allows you to search the field for a particular word or phrase and replace it with another (or nothing, if needed). This is helpful if terminology or capitalization of a particular term has been changed. However, please use with caution and check your page for any errors after using the replace function. Keyboard shortcut: **CTRL + H**

Bold | The **Bold** button will apply bold formatting to text highlighted before the button is clicked, or it can be clicked without any text highlighted and then any text typed afterward will be bold. Keyboard shortcut: **CTRL + B**

Italic | The **Italic** button will italicize text highlighted before the button is clicked, or it can be clicked without any text highlighted and then any text typed afterward will be italicized. Keyboard shortcut: **CTRL + I**

Format | The **Format** button lists the paragraph and heading formatting permitted on the website. Most text will be in paragraph format. However, paragraphs may have header phrases above them that users
may format in H2, H3, or H4, depending on page hierarchy and appearance desired. H5, a special option, is available for formatting dates and times and it should not be used for other purposes unless authorized by the Web manager.

3.5.2 Pasting into formatted text fields
The primary paste option in formatted text fields is Paste as Text. Some users will also have access to the Ingeniux Smart Paste dialog selector, in which they can select the Use Destination Formatting option. Note: The paste option

3.5.2.1 Paste as text
The Paste as Text option is useful because it pastes your copied content as plain text, ensuring that your page content won’t break because of extraneous formatting. The Paste as Text option will strip out hyperlinks and formatting from the pasted text, removing unwanted formatting when copying from a Word document or an email. For some users, using the CTRL+V pasting shortcut will call the Paste as Text function by default.

3.5.2.2 Paste using destination formatting
For more advanced users, clicking the Paste button in your editing toolbar (or using the shortcut CTRL+V) will open the Ingeniux Smart Paste dialog, where you may select Paste as Text, Use Destination Formatting, or Keep Source Formatting. If you are copying content from the CMS into another area of the CMS, you may select Use Destination Formatting. This option will preserve hyperlinks and some limited amount of formatting copied from one area of the CMS to another.

3.5.3 Adding a hyperlink
Hyperlinks are an important part of Web authoring. In the CMS there are several different kinds of links that can be created, and there are some key details to know about each.

Internal links
Links to other pages in the website (as seen in the site tree, see sec. 2.1, p. 7) are considered to be internal links. Internal links rely on the xID for the page to which the link points. By relying on this unique identifier, the link will retain its integrity even if the page is later moved somewhere else in the site. After creating your internal link, test it to make sure it works and goes where you intended it to go.

To create a link to an internal page:

1. Select the text to be hyperlinked in the formatted text field (usually Body Copy).
2. Choose the **Link** button in your editor toolbar:

   The Insert/Edit Link dialog appears.

   ![Insert/Edit Link dialog](image)

3. Type the first few letters of the desired page name in the **Page** field and select the desired page from the list.

   -or-

   Enter the xID for the page to which the link will point. **Be sure to include .xml at the end (i.e., x1234.xml).** You may also find the page in the site tree and drag it into the **Page** field and the xID with .xml extension will be automatically filled in.

4. The **Target** field offers options for where the link will open. For internal links, the page should open in the same window, thus, you won’t need to change the default setting.

5. Choose **insert** and your internal link will be created.

**External links**

Links to pages outside the website (i.e., not in our CMS) are considered to be external links. After creating an external link, it is important to test the link to ensure accuracy. You will also need to regularly check external links after they are published to make sure they continue to work.

**To create a link to an external page:**
1. Select the text to be hyperlinked in the formatted text field.

2. Choose the Link button in your editor toolbar:

   The Insert/Edit Link dialog appears.

3. Choose External from the Link To section.

   ![Insert/Edit Link dialog]

4. Type the URL for the desired page in the Address line.

5. The Target field offers options for where the link will open. External links must be set to open in a new window so you will need to change the default setting in this field to Open in new window (_blank).

6. Choose insert and your external link will be created.

**Document links**

Links to files stored on the Web server are called document links. Files referenced by document links must be uploaded to the appropriate folder in the documents directory on our server (see instructions below or sec. 4.2.4, p. 36). If you do not have access to upload a document to the server, contact the Web manager for assistance in uploading so that you can add your link.

**To create a link to a document or file:**

1. Select the text to be hyperlinked in the formatted text field.

2. Choose the Link button in your editor toolbar:

   The Insert/Edit Link dialog appears.
3. Choose Document in the Link To section.

![Image of Link To section]

4. Choose Browse (the button to the right of the Document field).

The Asset Manager dialog box appears, pointing to the Documents folder.

![Image of Asset Manager dialog box]

5. Use the folder structure on the left to navigate to the desired documents folder.

   Note: If the Upload button is grayed out, it means you don’t have permission to upload to that particular document subfolder. Either navigate to the correct subfolder and upload or contact the Web manager for assistance (also see sec. 3.7, p. ?? on document uploading and management).

6. If the desired file has not been uploaded, choose Upload from the tools in the upper-right corner of the dialog box.
a. Choose Browse to locate the file to be uploaded.

b. Choose Upload.

7. Select the desired file on the right and choose OK.

8. The Target field offers options for where the link will open. External links must be set to open in a **new window** so you will need to change the default setting in this field to Open in new window (_blank).

9. Choose Insert and your document link will be created.

**E-mail links**

Links to e-mail addresses can be created very easily in the CMS. Type the e-mail address into the formatted text field and press the SPACE BAR to automatically create the link.

If you want to change the text of the link (e.g., if you would like the link text to be the word “E-mail” instead of the actual e-mail address), simply click somewhere in the middle of the link, type your new link text, then delete the rest of the old link text using backspace and the delete key as needed.

Or you may type in your desired link text, highlight the text, click the Link button in the editor toolbar, select E-mail from the Link To options and then enter the address and click Insert.

**Removing a hyperlink**

Links that are no longer valid can be removed without deleting the underlying text.

1. Click somewhere on the link in the editor.
2. Click the Unlink button:

-or-

1. Right-click the hyperlinked text in the editor.

2. Choose Unlink from the context menu that appears.

3.5.4 Adding anchor links in-page navigation

Anchor links, also known as in-page links, are used on pages that have a lot of text to aid viewers in jumping down to parts of the text of particular interest without having to manually scroll down. Anchors must first be created in the sections you would like viewers to be able to jump to.

Creating a page anchor that can be linked to in-page or from another page

The Anchor button in the editor toolbar allows users to create a page “anchor” that can then be linked to from a link elsewhere on the same page or from a different page.

1. Click (do not highlight) on the left side of the text that should be anchored.

2. Then click the Anchor button and type in the desired link name (no spaces). Avoid naming two anchors on one page with the same anchor name.

Important: this link text is visible to site viewers, so keep the text simple, clear, and appropriate.

To create an in-page link to an anchor:

1. Highlight the text to be linked and click the link button in the editor toolbar:

2. Choose Anchor and then select your anchor from the anchors list or type #anchorname (with your anchor’s name) in the URL field.

To create a link to an anchor from a different page:

1. Highlight text to be linked and click the Link button in the editor toolbar.

Enter the xID of the page to be linked to (don’t forget the .xml extension) then add # and the anchor name.
Example: x1234.xml#scholarship