~ Town of Norfolk ~

Website Content Management System

Prepared for Town of Norfolk (May of 2018)

This document is intended for "General Content Editors"

Chapter 1

Getting Started

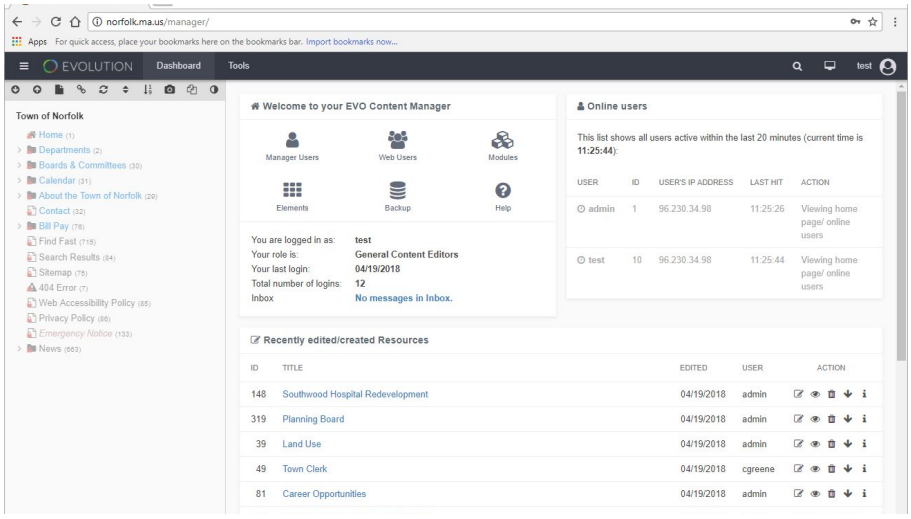
The Town of Norfolk's website takes advantage of what is known as a CMS, or content management system. This allows different users to create, edit and delete content on the website. This article was created to get you started with the basics and become familiar with the interface.

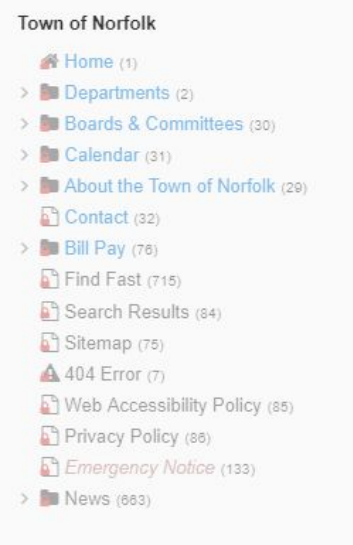
How to Access

The easiest method of accessing the CMS manager is by going to http://norfolk.ma.us/manager/ or clicking the **Manager Login** link found at the footer of the Town's website.

The Interface

After successfully logging into the manager you will be presented with a dashboard and the resource tree. You may see different content and have different access depending on your account.





The bulk of your work is performed using the resource tree (left panel of the manager interface). This is where all the *documents* and *weblinks* appear.

The resource tree shows the root directory for the Town of Norfolk's website. Even though we can see all the resources, we don't actually have permission to edit them. Resources that you do not have permission for will appear lighter, or "greyed out".

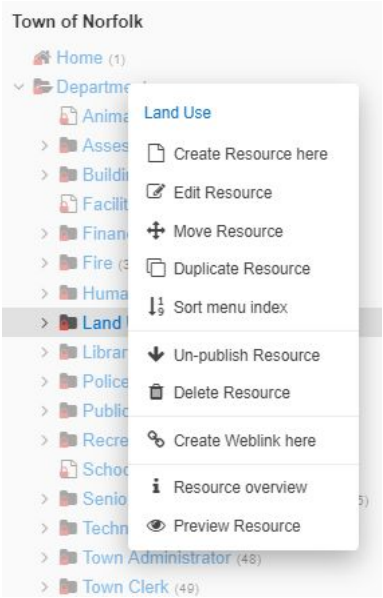
Note | If you accidently click on a resource that you don't have access to, an alert with the text: "You do not have the correct permissions for this Resource" will appear and clicking Ok will return you back to where you were.

For this training material, we've created a manager account called "test" and given it permission to the Land Use department.

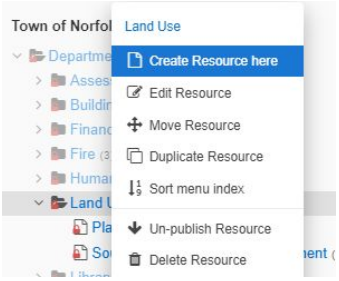
In order to access the document(s) our test manager account has permissions for, we need to find the **Land Use** document(s) under **Departments**. Clicking the drop down arrow to the left of **Departments** will expand and show its *child resources*.

The **Land Use** document appears darker since we have access to it. Note that there is a drop down arrow for Land Use indicating there are *child resources*.

Whenever a new *document* or *weblink* is created in the resource tree there will be an ID number associated with it. This ID number is automatically created by the system and can be seen to the right of the document's title. It's good to be aware of these ID numbers as they provide some important functionality that will be explained at a later point in this training material.



By ***right*** clicking on a document's title you will be presented with a menu of various options. Most of these options you may understand right away.

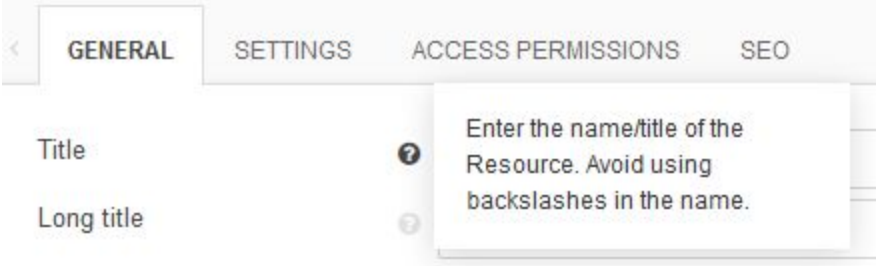


Creating A Document

In this example we're going to create a new document under **Land Use**. The first thing we need to do is ***right*** click on the **Land Use** resource to see the menu and then choose **Create Resource here**.

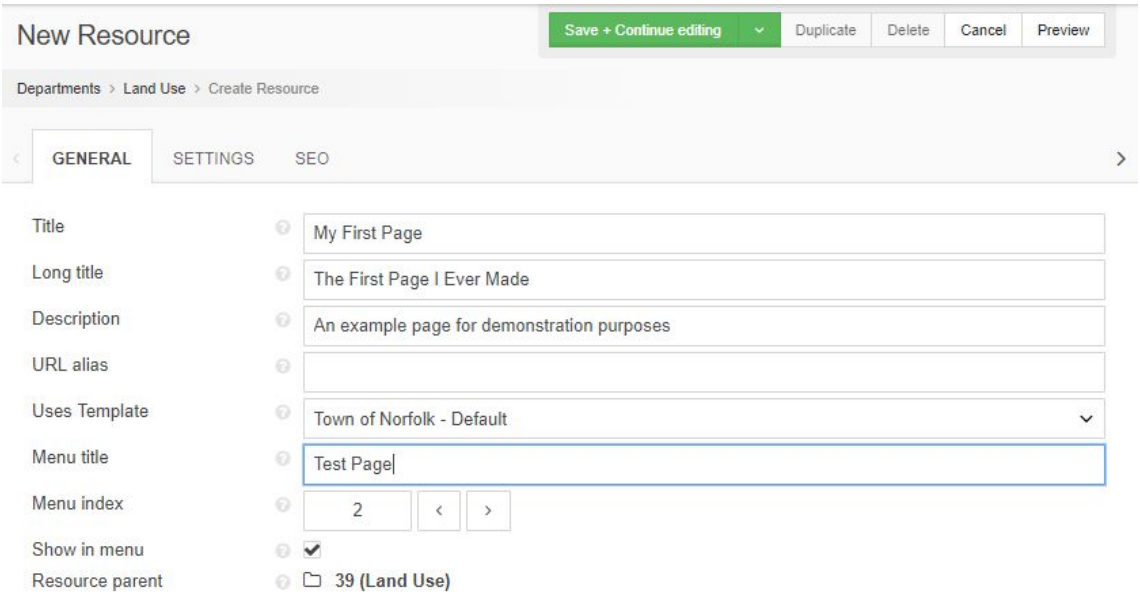
A **New Resource** page will appear with a list of fields that you can work with. Some fields are required while others are optional.

You may notice a question mark icon next to these input fields. When you place your mouse pointer over them you will be presented with an explanation as to what that field is for.



Let’s go through some of the most common fields that you’ll be using;

- **Title -** The title will appear in the resource tree as well as in the browser title bar when viewing the website. The title field will also become the primary header of the page.
- **Long Title** *(optional)* **-** An alternative title that will appear as the primary header of the page content.
- **Description** *(optional)* **-** Your account may not show this field but if it does you can leave it blank. The description field is primarily used for search engines.
- **URL alias** *(optional)* **-** This is the name of the document with respect to the website URL address. If we typed **example** the URL for the document becomes http://norfolk.ma.us/departments/land-use/**example**.htm *(If this field is left blank, the system will automatically generate an alias based on the the title field. You can edit this field as necessary.)*
- **Uses Template -** The template determines how the page will look when viewing it on the website.
- **Menu title -** This is the text that will appear in menus. Be sure to keep menu titles short and to the point.
- **Menu index -** The menu index is the sort order of the resources in the tree. The system will automatically populate this field. You usually don’t have to worry about this field and a further explanation is provided later in this training material.
- **Show in menu -** This option is on by default and will make your resource viewable in the navigation. If you want to hide it from navigation lists, uncheck this.
- **Resource parent -** The resource parent has been chosen for us because we’re creating a new document under the Land Use resource which is acting as a container. You can populate this yourself by clicking the document folder icon and then clicking on the parent document from the tree menu.



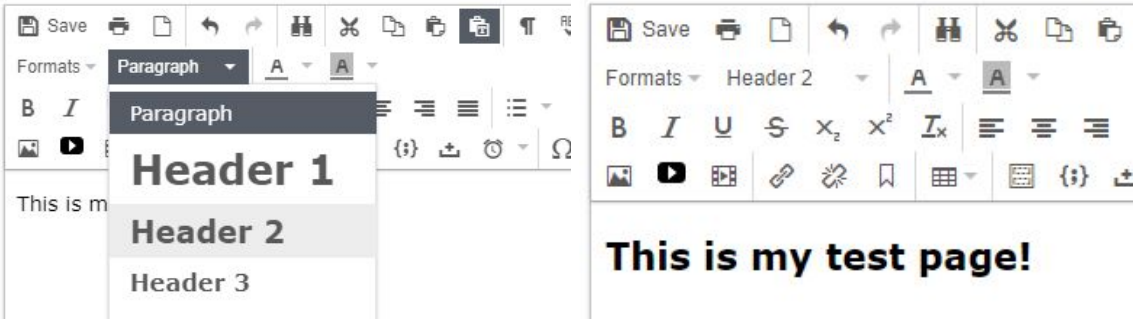
Resource Content Editor

Resource content field is the main editing area of the page. The built-in editor is a simple word processor and allows you to type in your page's information and add links and images. If you're familiar with HTML you can take advantage of the source code button (button with two brackets < >) to directly edit generated code of the content (be careful though!).

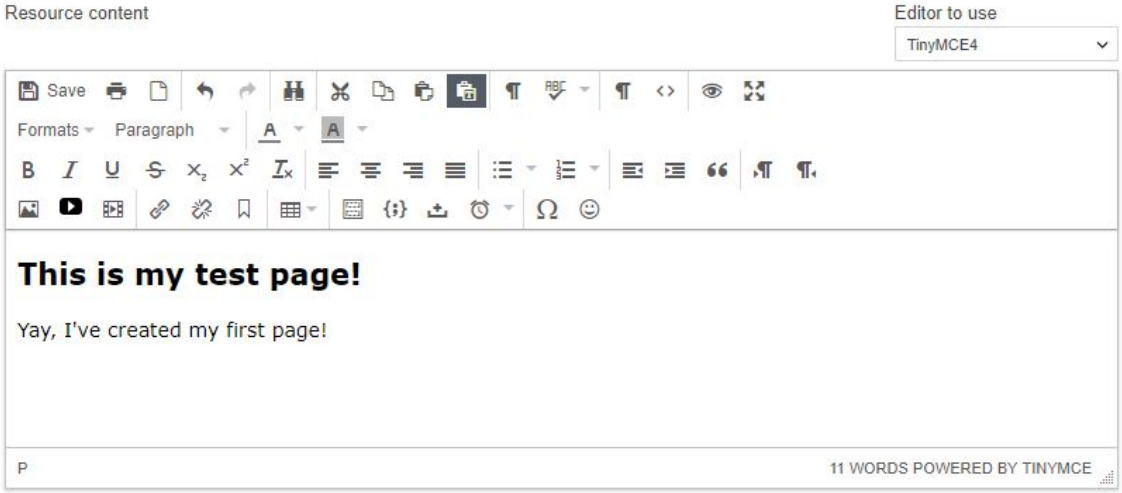
Remember that what you see in the editor will not look exactly the same as it will appear on the website. This is because you're working with pure content that has yet to be stylized by the template.

In our first example we'll be adding a **header**, a **paragraph** and a **line break**..

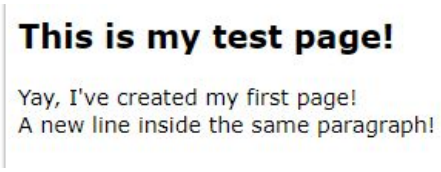
1. Add some text that will become our header.
2. Choose **Header 2** for our block type and the text will become Header 2



3. Hit your **Enter key** to start a new line. This new line will automatically switch back to the default **Paragraph** block type. Add some text to create our paragraph.

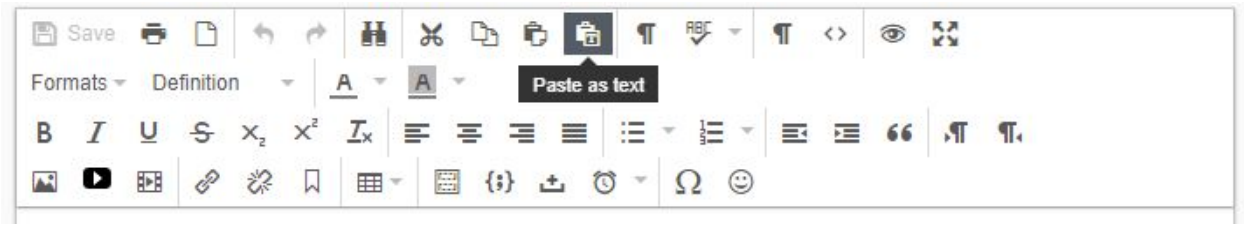


4. If we hit the enter key again, we'll create another paragraph. However, this time, we don't want a new paragraph. Instead, we're going to create what is known as a line break. Using a line break can be useful for writing a poem or an address, where the division of lines is significant. To do this, **hold down the Shift key** and then press the **Enter key.** You can add some text to see that this new line will be inside the current paragraph.



Try creating more content and use various format blocks. Remember that when you using headings they should be in sequential order. (ex. Header 2 before Header 3, Header 3 before Header 4, etc)

Pasting Content

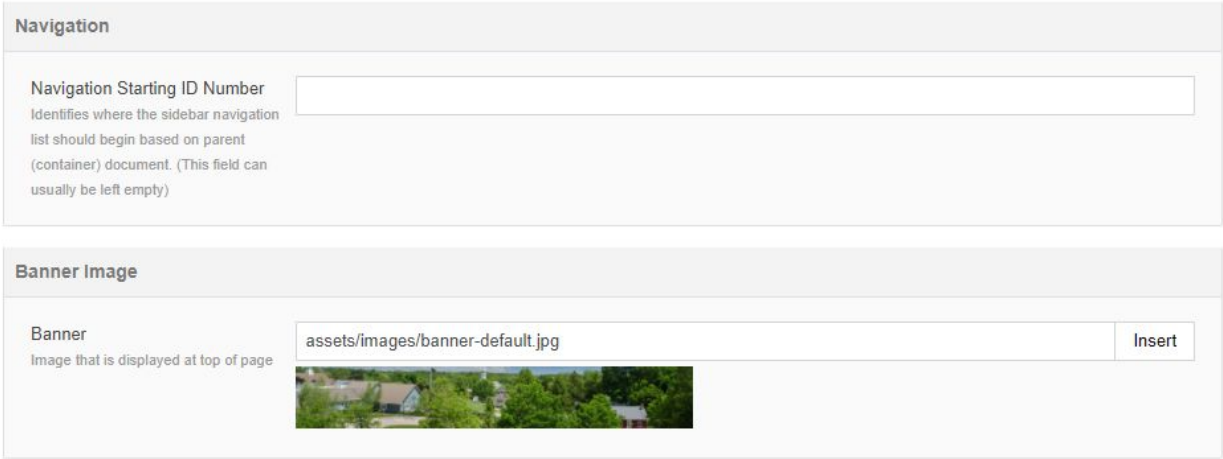


Paste as text is active by default and is a safer way to paste content for the web. This prevents "junk" formatting from being copied into the editor from software such as Microsoft Word or even another website.

There are times you may wish to copy formatting, especially if you're copying what's already in the editor. To do so, click the **Paste as text** button to toggle the option off (or on). You'll know this option is active as it will be highlighted with a dark background.

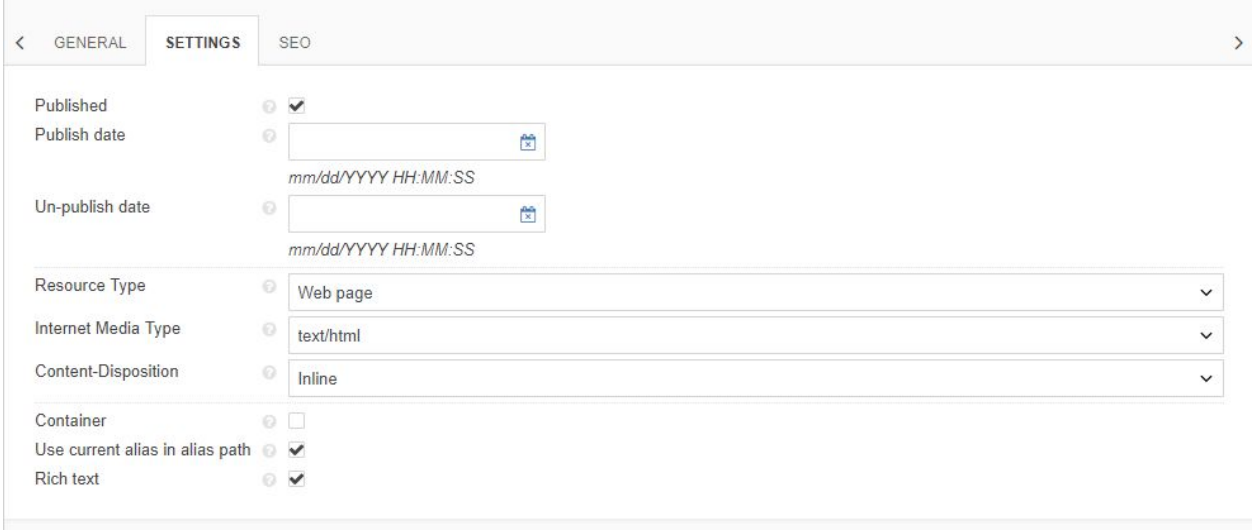
Template Variables

Template Variables are associated with the template chosen in the **Uses Template** field. They provide additional content fields. Further explanation is provided in Chapter 4. For our example, we'll leave them alone.



Settings Tab

We've been working in the **General** tab and now it's time to go the **Settings** tab.



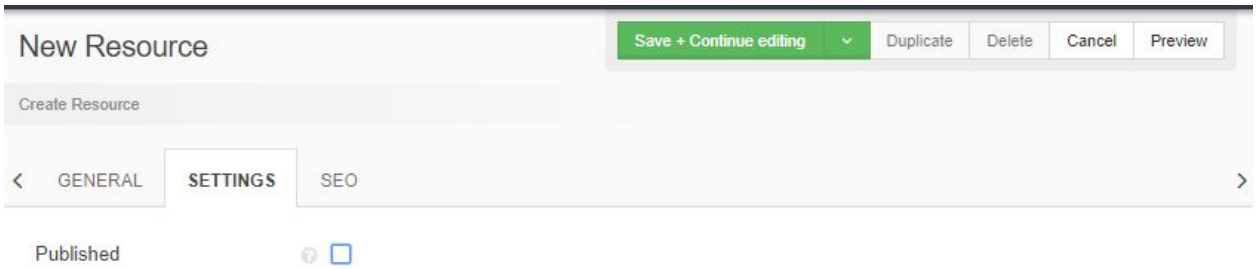
The **Settings** tab offers a few features that you may find useful depending on what your trying to accomplish;

- **Published -** By default, your new page will automatically be published when you save it. This means it's going to be viewable by the public! If you're not done with what you're working on and don't want it seen by the public be sure to uncheck this. In this example we're going uncheck it before saving.
- **Publish date -** Allows you set a date when you'd like to have the resource publish automatically. For example, if we create a page for a book reading event that doesn't happen for a few months then we can set a date that goes live 2 weeks before the event.
- **Unpublish date -** Allows you set a date when you'd like to have the page unpublish. Continuing the Publish date example, our book reading event page can automatically unpublish the day after the event has occurred.

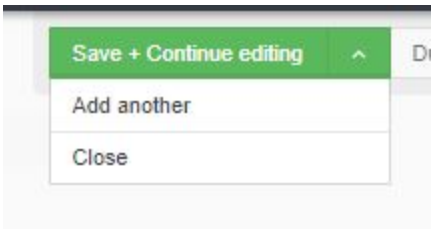
Saving Your Work

We've **unchecked the Published option** and will click **Save + Continue editing**.

There is currently no auto-save feature so please remember to save often!



A note about the save button…



By default, **Save + Continue editing** should be selected. If it's not, you can find it in the drop down menu. This keeps the page your working on open every time you click "Save". If you're all done and wish to close the page, click the drop down arrow and choose **Close**. This will perform a **save *and* close**.

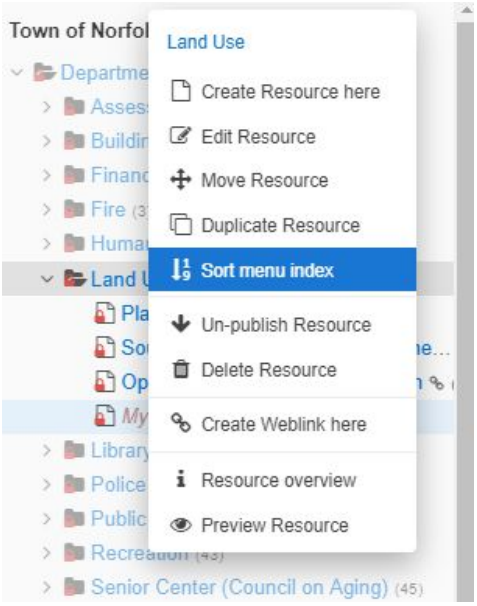
Now that the document has been saved we can see "My First Page" in the resource tree.

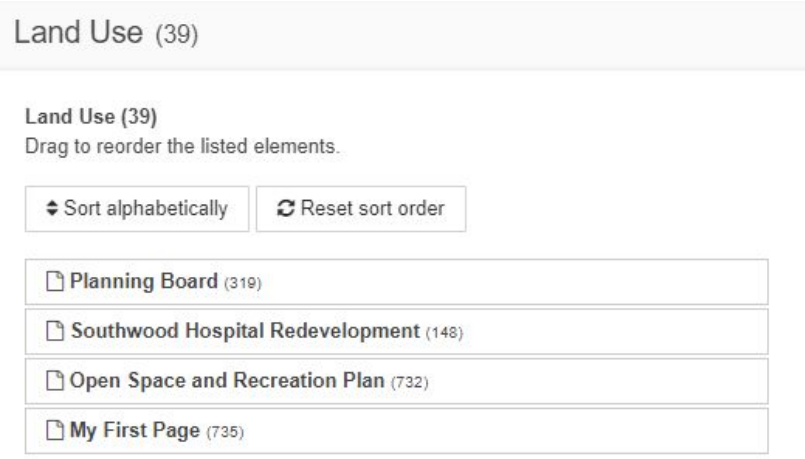
Changing the Sort Order

The order of how resources appear in the resource tree is based on the menu index number. The system automatically picks the next available number based on the current index sequence of other resources in the tree. However, the system doesn't always pick the order you're looking for, especially if you'd like the order of the resources to be alphabetical.

Once upon a time, the process was done by manually editing the menu index field of each resource. This was time consuming and troublesome when trying to alphabetize a whole list of a resources.

Now there's a much easier way by using the **Sort menu index** tool. In our case we're going sort the resources under **Land Use**. ***Right*** click the **Land Use** resource and then choose **Sort menu index**.





A button is provided to easily sort the selected resources alphabetically. We can sort them ascending or descending.

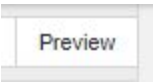
We can also drag and drop the list of resources to customize the sort. There may be a time when you'd prefer to have a resource at the bottom of the navigation list vs the top.

For our example we're going to manually drag "My First Page" above "Open Space and Recreation Plan". Once you're satisfied with the order, click **Save**.

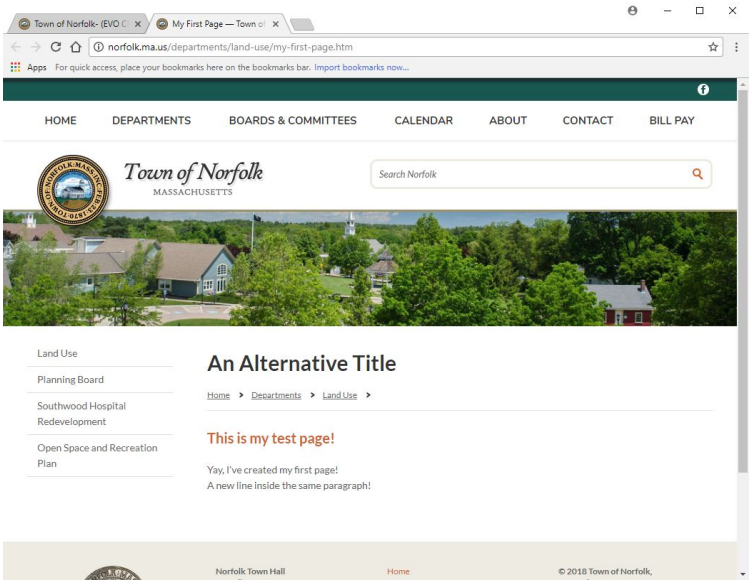
The order of the documents in the resource tree should now mirror what we set in the sort menu index.

Preview & Publish

Now that we've made sure the order of our resources is correct we need to edit our new document. We can do this by either left clicking the resource's title or ***right*** clicking to bring up the menu and choose **Edit resource**, let's take a look at our new page. Now we'll use the **Preview button** on the resource page to take a look.



A new window or tab should open with the preview…

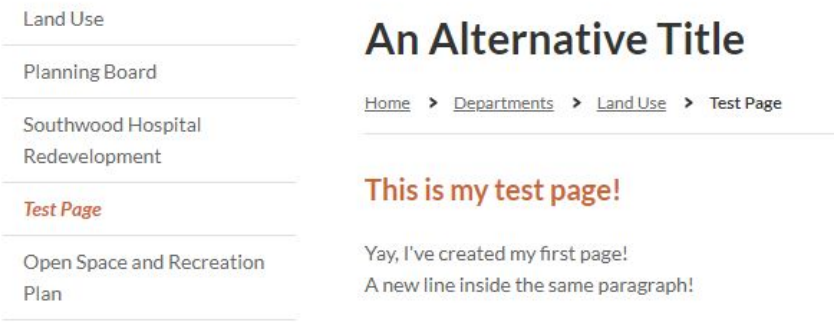


We can now see what content has been applied.

The title bar of the web browser tab shows the **Title** field **"My First Page"** and the **URL alias** field **"my-first-page.htm"** in the address bar.

Notice how our **Header 2** is now stylized according to the template as well as the paragraph.

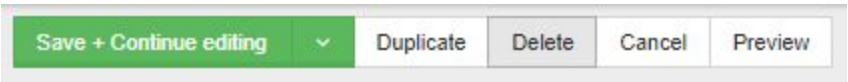
But wait, why is our **Menu title** field **"Test Page"** missing from the navigation list. In this instance it is because our page is currently unpublished and is only viewable while logged into our manager account. So let's go ahead and **Publish the document** so the world can see it.



There it is! Now your page is published and accessible via the menu list. You'll also note that the resource tree shows your document title differently to indicate that it's been published. Remember the **Show in menu** option? We can hide this link even when published by unchecking that.

Deleting Resources

Now that we're done with our test document it's time to cleanup and delete it.
There's two ways of performing this. The first is within the resource tree. ***Right*** click the document and choose **Delete resource**. Or if you're in the resource editor you can click the **Delete button**.

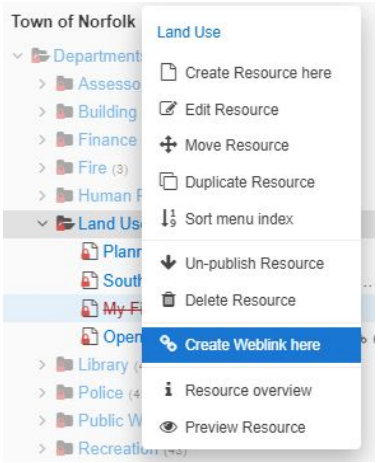


Once we've deleted our document, the resource tree will show it crossed out. If you didn't mean to delete your document you can right click on it and choose **Undelete resource**. This option is only available until an administrator purges deleted pages. Once it's been purged it can never be recovered. When deleted resources are purged is at the discretion of the administrator(s).

Chapter 2

Weblinks

Weblinks are another type of resource. They have a lot in common with documents but with one major difference, there's no content editor.



To create a weblink we use the same process of selecting a parent resource and choosing **Create Weblink here**.

The following fields may be ignored for weblinks;

- Long Title
- Description
- URL alias
- Uses Template

All other fields act the same as if we were editing a document.

The Weblink Field

The primary "content" of a **Weblink** is the link itself. There are three ways to add a link. The first is to manually enter a web page address in the input field. For example, we can put **www.google.com**

Another way is to click the **Insert button** and select an uploaded file (uploading files will be covered in the next chapter). In this example, we've chosen a PDF file under the land use folder.

The final way is to directly link to another document in the resource tree;

1. Click the **Chain link icon**.

2. The icon will “open” and now we can click on a document in the resource tree.

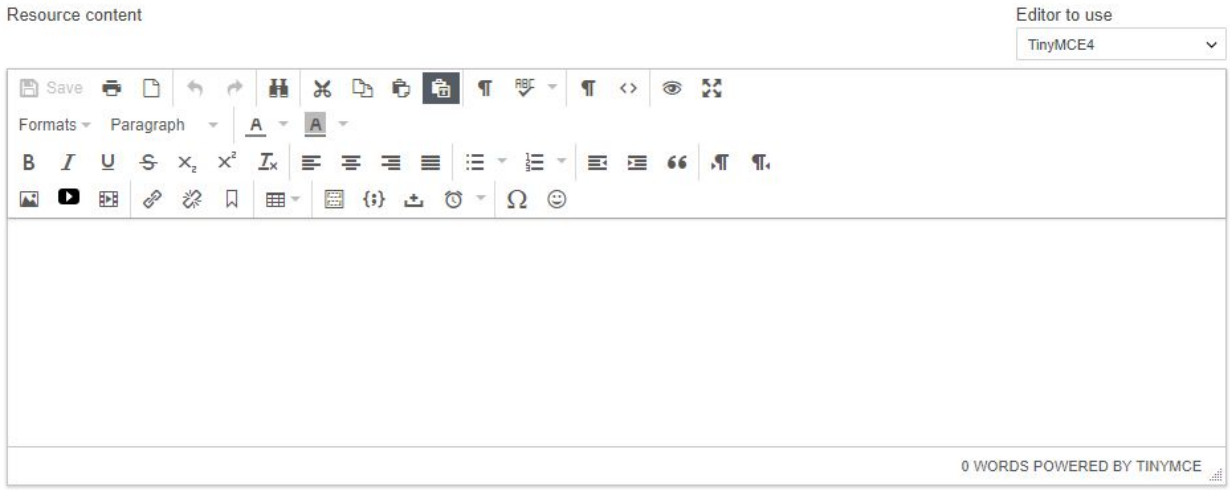
3. Once we’ve clicked on a document in the resource tree, the Weblink field will populate with that resource’s ID number. Alternatively, we can manually enter the ID number.

Continue editing your Weblink resource as you would a Document.

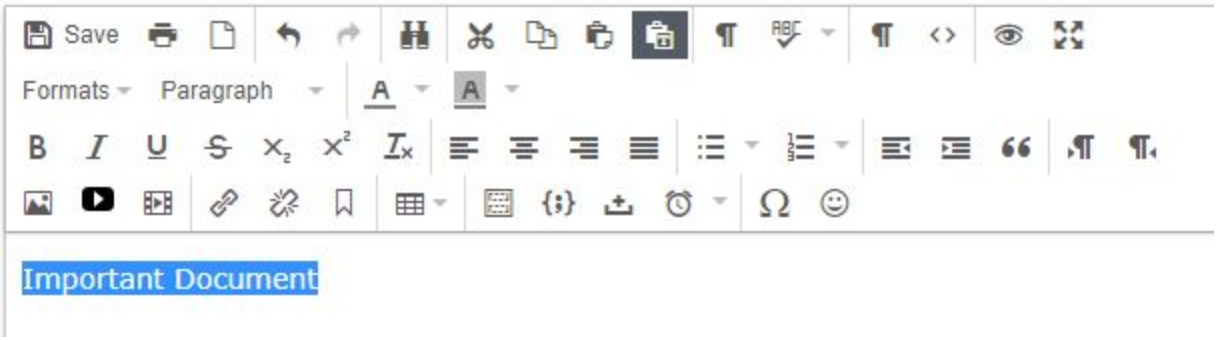
Chapter 3

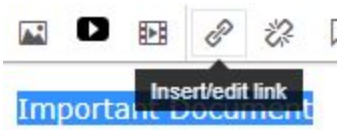
Uploading a file and linking to it

Before we can do anything, we need to be editing a document. Create a new document or edit an existing one.



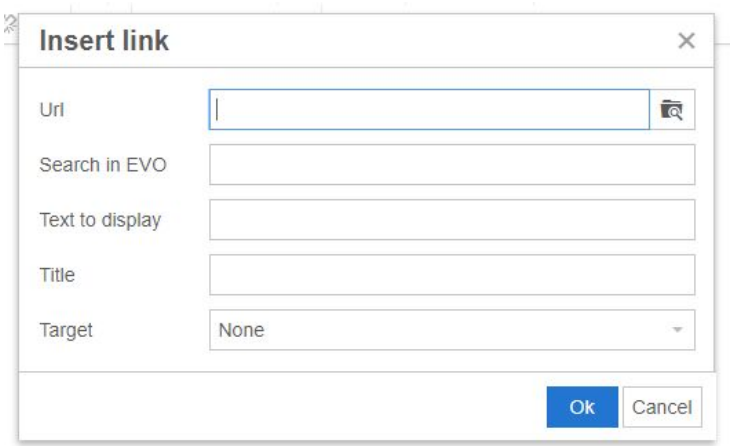
In order to create a link to a file such as a PDF we need to have some text. In the editor type "Important Document" and then highlight the text by selecting it.





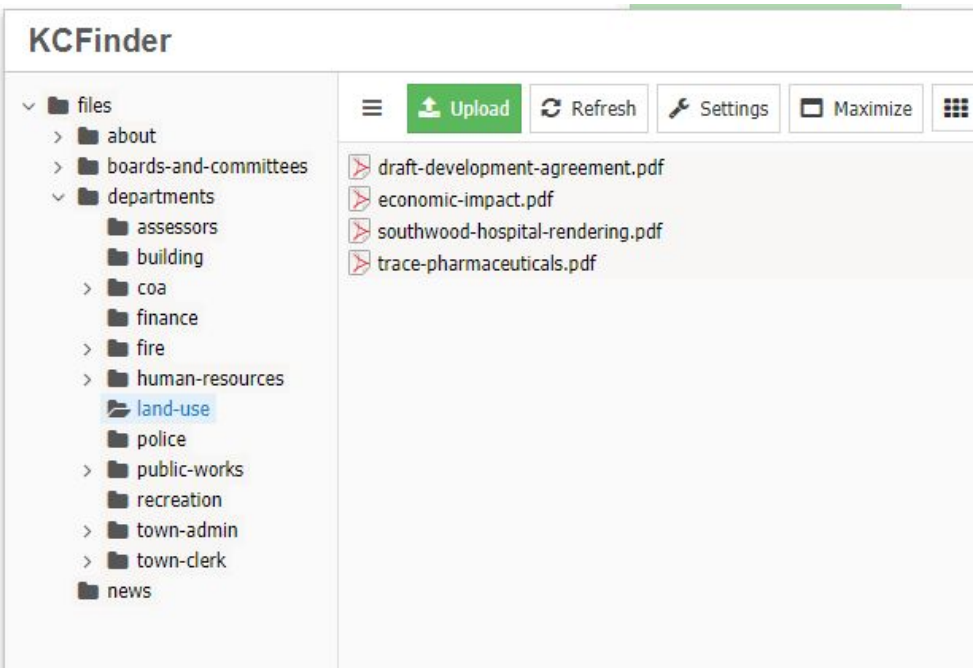
Click the **Link button** (icon is a chain link) and a new window will open.

To the right of the URL field is a **File Browse icon**. Click on it to bring up the file browser.

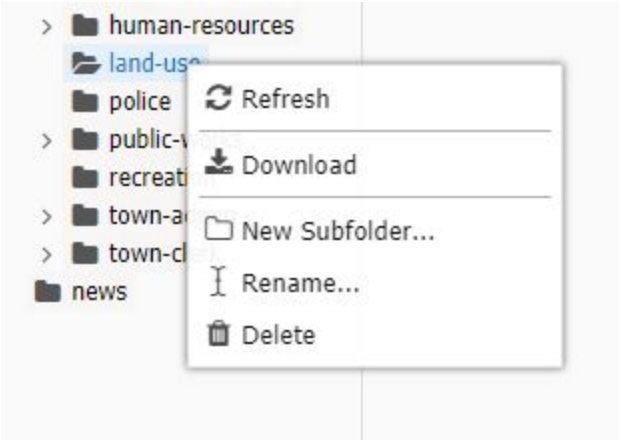


Note | The Insert link **URL field** may be populated with a web page address (ex. www.google.com) or an e-mail address. A resource's **ID** may also be used in the **URL field** to directly link to another resource. (type in the **Search in Evo** field to find a resource quickly)

Now that we've opened up the file browser we can choose where our file is going to go. It's important to keep your files organized. Depending on your account and access you may see different folders than what is shown here.



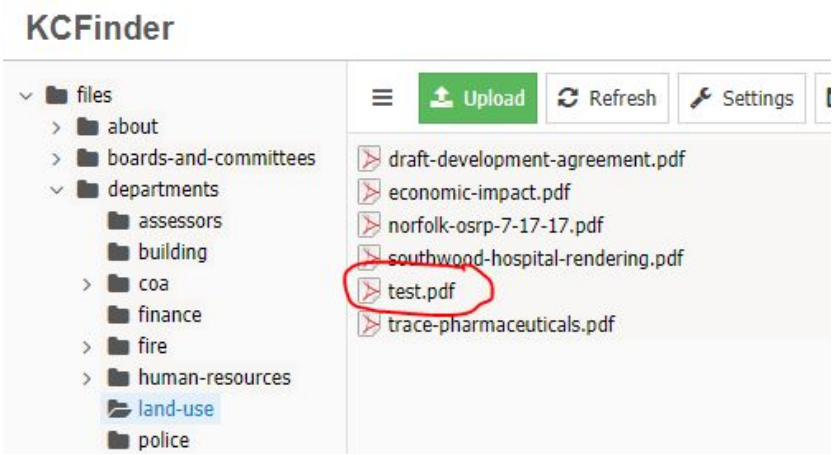
If needed, you can create a new folder by right clicking a folder in the tree menu and selecting **New Subfolder...**



In this example we're not going to create a new folder and just go ahead with uploading the file to the "land-use" folder.

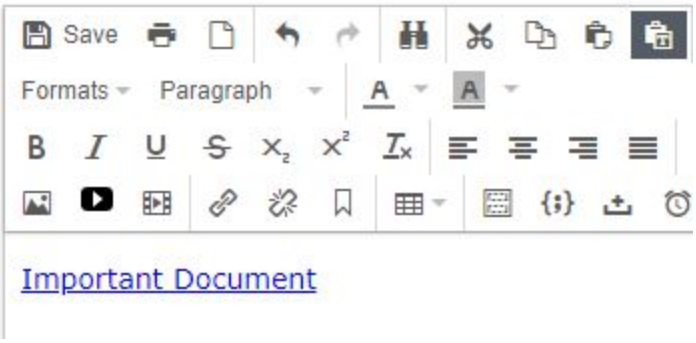
> **Note** | It's a good idea to name your files in their most basic form. Don't upload a file that's named "This is my most awesome cool project (4) UPDATED part 2.docx" and instead rename it to the proper context of the link, ex. "awesome-project-part-2.docx". Be aware that by default, the upload process will convert your file's name to all lowercase and replace spaces with hyphens.

You have two ways of uploading a file to the file browser. The first is **dragging and dropping your file** directly on top of the browser window or by clicking the **Upload button**. Choose the method that's most convenient. Be aware that using the drag and drop feature may fail when uploading large file sizes and alternatively use the upload button.



Now that my test.pdf file has been uploaded I'm ready to create the link. Double click the file you want and the file browser should close and automatically populate the **Link URL** field.

Click **Ok** finalize your link.



Your link is now complete. If you want to remove the link you can place your typing cursor somewhere between the linked text or select and highlight the text again. The chain buttons should become active. Click the **Unlink button** (Icon is a broken chain) and your link is now removed.

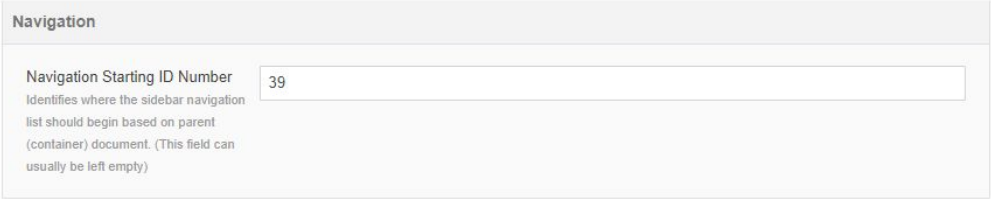
Chapter 4

Template Variables

Template variables are additional content tied to a resource. They are associated with the template that is chosen for a resource so if you change the template, the available template variables may change. The two most common template variables are **Navigation Starting ID Number** and **Banner Image**.

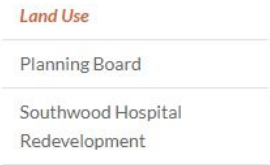
Navigation Starting ID Number

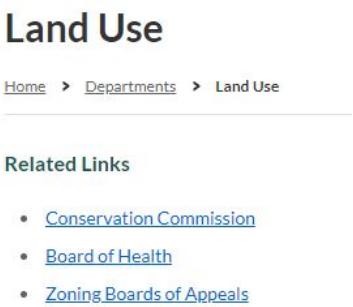
The Navigation Starting ID Number tells a sub navigation list what resource it should build from. In this example, the resource ID number is 39. That's the ID number for the Land Use page.



Using an ID of 39, our sub navigation list starts at Land Use and shows the child resources. When viewing the website, we'll see Land Use and the two child resources; **Planning Board** & **Southwood Hospital Redevelopment**.

Please note that you will not always need to populate the **Navigation Starting ID Number** field. Child resources should usually be left blank so that they use the default "parent" ID as their starting point. In our example, **Planning Board** and **Southwood Hospital Redevelopment** pages have a blank **Navigation Starting ID Number** field as they "belong" to the Land Use container.





Banner Image

The Banner Image template variable is available for most templates. If this field is ever left blank, it will revert back to its default setting. The minimum image size needs to have a pixel dimension of 1920 wide by 300 high. If the image is larger than this, the system will automatically resize, crop and realign to fit. If it is less, the image will not appear correctly on the website. It is highly recommended that when creating a new banner image that some form of graphics editing software be used.

Chapter 5

“Information” Template Variable

The Information block is a special Template Variable created specifically for the main page of a department. They are found on the document template “Town of Norfolk - Default w/ Info Block” and provide a place to put e-mail addresses, phone numbers, mailing address, etc. related to that specific department.

The content structure is built using definition lists. Care must be taken to ensure the definition list structure is maintained when this block is edited. In the rare instance that the definition list has been altered too much, the HTML code may have to be manually edited.

The following HTML structure should be used as a baseline;

```
<dl>
    <dt>Define Term</dt>
        <dd>Definition</dd>
</dl>
```

A real world example;

```
<dl>
    <dt>Contact</dt>
        <dd><strong>Richard McCarthy<br></strong><em>Town Planner<br><a
        href="mailto:rmccarthy@norfolk.ma.us">rmccarthy@norfolk.ma.us</a></
        em></dd>
    <dt>Phone</dt>
        <dd>508-440-2807</dd>
    <dt>Address</dt>
        <dd>Town Hall<br>One Liberty Lane<br>Norfolk, MA 02056</dd>
    <dt>Hours</dt>
        <dd>Monday thru Thursday<br>9 AM &mdash; 6 PM<br>Friday:
        Closed</dd>
</dl>
```

Chapter 6

Working with Images

Uploading and working with image files is similar to working with document files. However, there's some additional functionality that you may take advantage of when adding images to your document.

> **Note** | If you upload an image that is larger than 1920x1920 pixels, the system will automatically resize (and maintain proper aspect ratio).

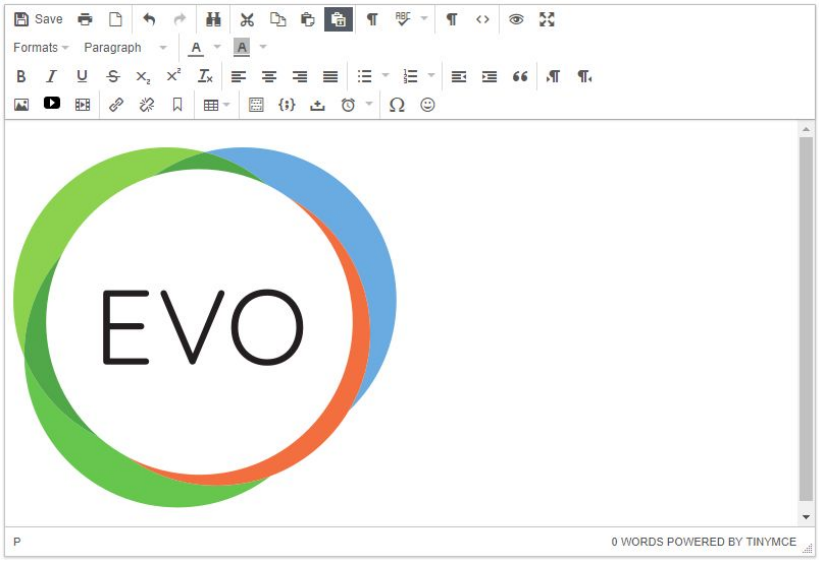
Automatic Thumbnail Creation

The editor has a built-in plugin that aids in the creation of thumbnails. Advantages of using thumbnails for large images are; faster web page loading, improved viewing for end user and the ability wrap text around it.

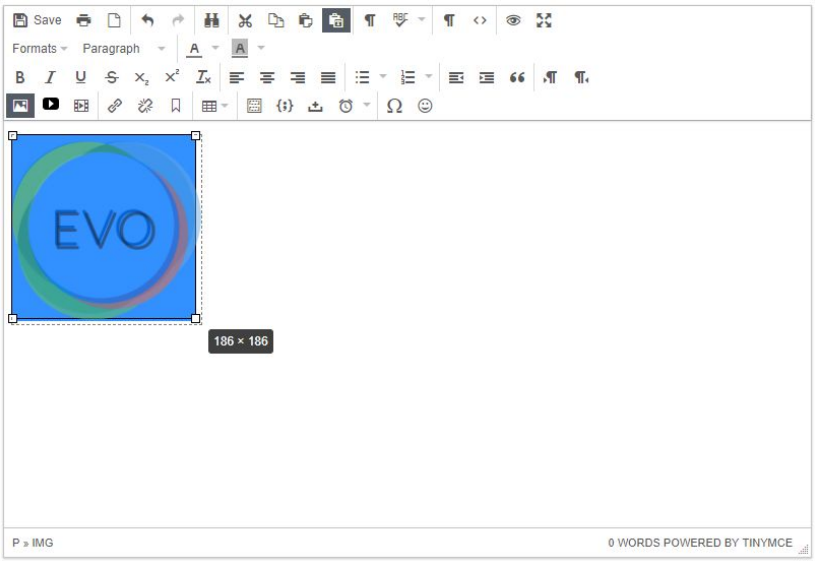
The plugin will automatically create a thumbnail sized image based on what you resize the image to in the editor, creates a link to the larger image and provides a "pop up" window to show the full version.

The process is as follows;

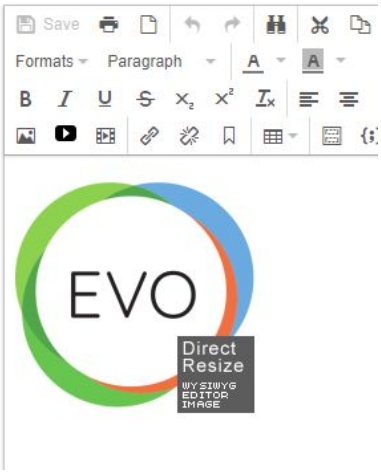
1. Insert your image



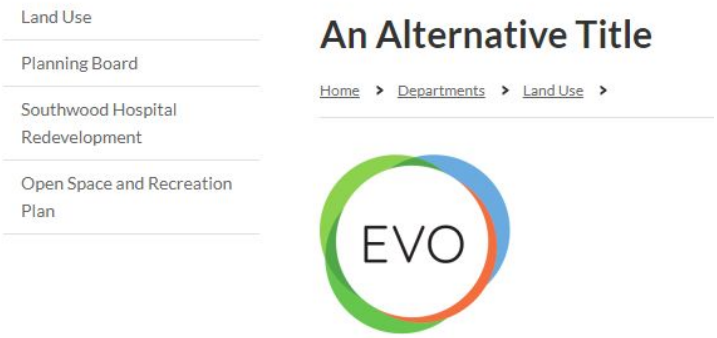
2. Resize the image to the size you would like the thumbnail. A dimension tag (186x186 in this example) is provided as you increase/decrease its size.



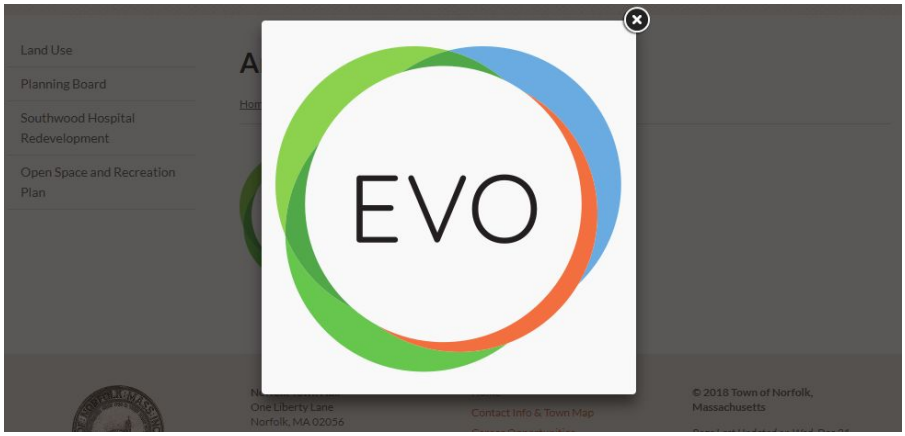
3. Now for the “magic”. When you Save your document, the thumbnail will automatically be created. You’ll know this when the image has a “Direct Resize” tag added to it. Don’t worry though, the tag doesn’t show on the live web page. You can resize as many times as needed and a thumbnail version will automatically be updated.



4. Our thumbnail has been created and we can see the smaller image on the web page.

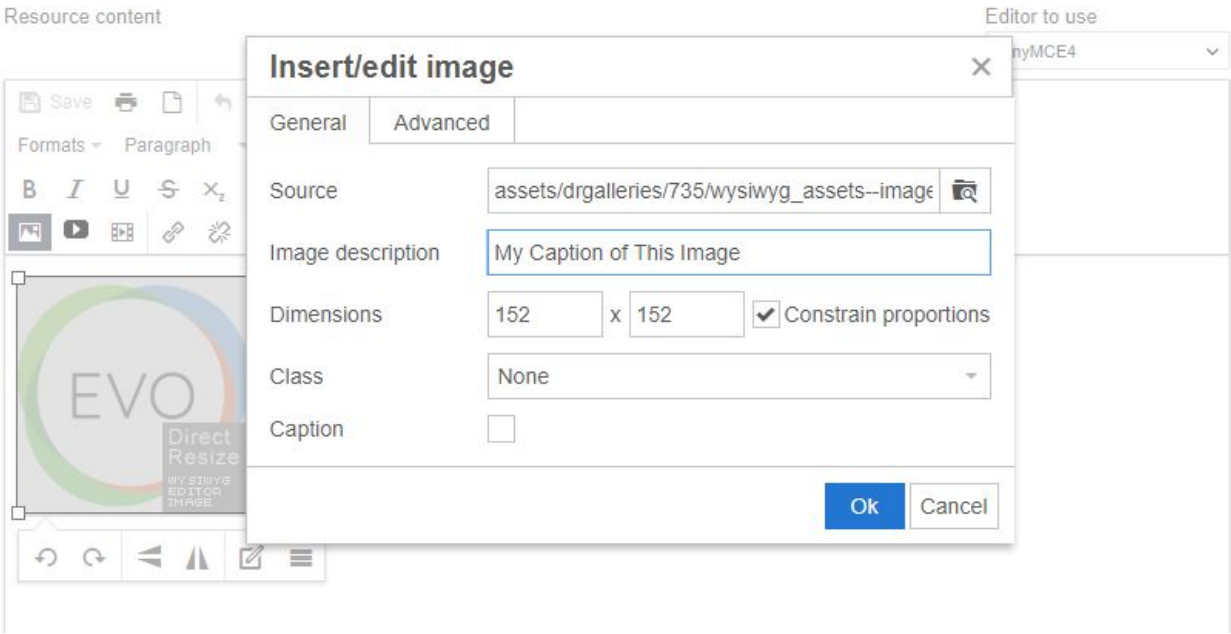


5. When we click on it, we'll be presented with a popup of the larger size.

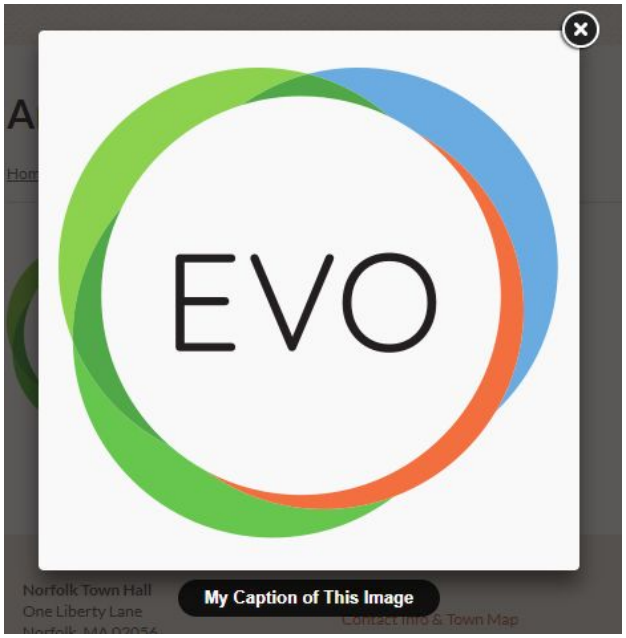


Adding A Caption

We can add a caption to our pop up image by using the **Image description** field. In this example, we've added "My Caption of This Image" and saved the document.



Previewing the page and clicking the thumbnail, we'll see the added caption at the bottom.

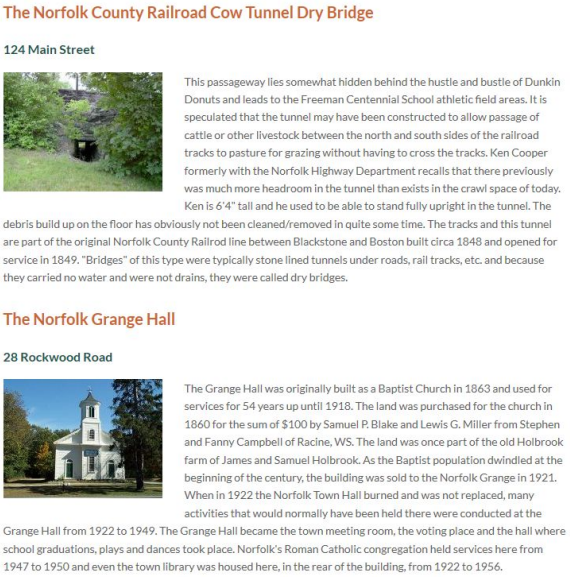


Wrapping Text

There are times when you may want to add small images or thumbnails to a document and have it become part of the flow of a paragraph.

In the example below, we can see two thumbnail images “floating left” of their paragraph and the text neatly wrapping around it. You can also “float right” an image.

Let’s look at how this is achieved...



The Norfolk County Railroad Cow Tunnel Dry Bridge

124 Main Street

This passageway lies somewhat hidden behind the hustle and bustle of Dunkin Donuts and leads to the Freeman Centennial School athletic field areas. It is speculated that the tunnel may have been constructed to allow passage of cattle or other livestock between the north and south sides of the railroad tracks to pasture for grazing without having to cross the tracks. Ken Cooper formerly with the Norfolk Highway Department recalls that there previously was much more headroom in the tunnel than exists in the crawl space of today. Ken is 6’4” tall and he used to be able to stand fully upright in the tunnel. The debris build up on the floor has obviously not been cleaned/removed in quite some time. The tracks and this tunnel are part of the original Norfolk County Railrod line between Blackstone and Boston built circa 1848 and opened for service in 1849. “Bridges” of this type were typically stone lined tunnels under roads, rail tracks, etc. and because they carried no water and were not drains, they were called dry bridges.

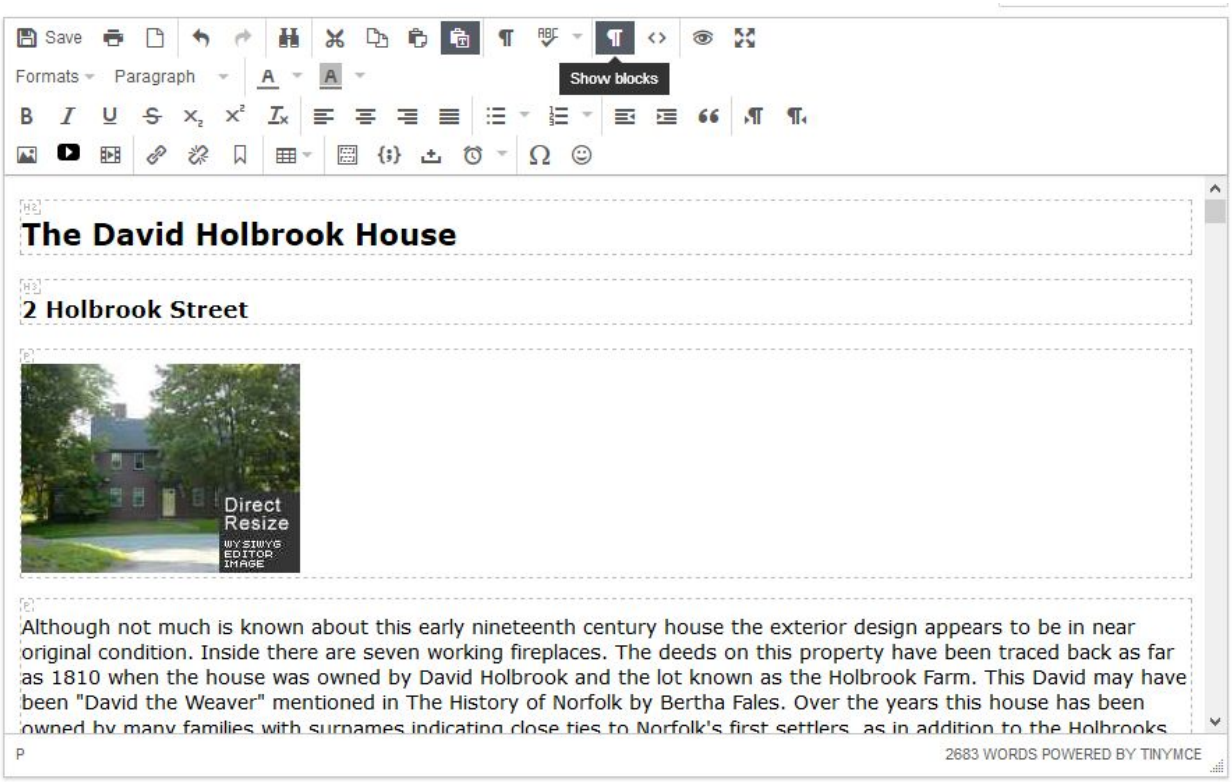
The Norfolk Grange Hall

28 Rockwood Road

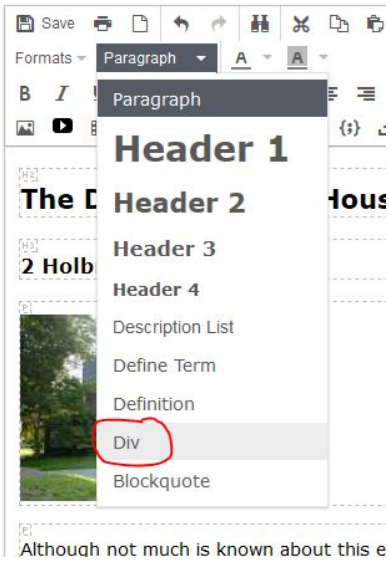
The Grange Hall was originally built as a Baptist Church in 1863 and used for services for 54 years up until 1918. The land was purchased for the church in 1860 for the sum of $100 by Samuel P. Blake and Lewis G. Miller from Stephen and Fanny Campbell of Racine, WS. The land was once part of the old Holbrook farm of James and Samuel Holbrook. As the Baptist population dwindled at the beginning of the century, the building was sold to the Norfolk Grange in 1921. When in 1922 the Norfolk Town Hall burned and was not replaced, many activities that would normally have been held there were conducted at the Grange Hall from 1922 to 1949. The Grange Hall became the town meeting room, the voting place and the hall where school graduations, plays and dances took place. Norfolk’s Roman Catholic congregation held services here from 1947 to 1950 and even the town library was housed here, in the rear of the building, from 1922 to 1956.

First we’ll toggle the “Show blocks” feature of the editor. This will help show the block elements of what’s on the page. In the example provided, there’s a block for **H**eader**2**, **H**eader**3**, **P**aragraph (with our image) and another **P**aragraph (with our text)

.

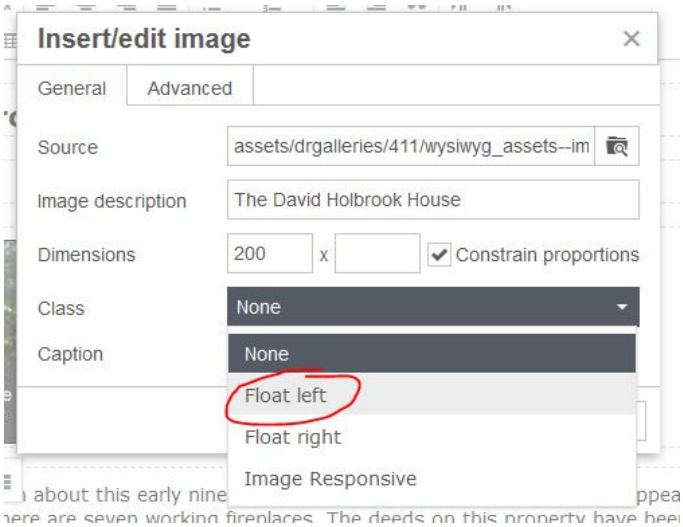


The paragraph block that wraps our image needs to be changed to a **Div**. To change it, you can click on the **Paragraph** block or the image that's inside. Now from the block type drop down, we'll change it to **Div**.



Now that our image is in a **Div** block, we can setup the image to "float left" (or right).

Be sure to select the image. Click the **Image options** button. From the Insert/edit image interface we will open the **Class** drop down menu and choose **Float left**.



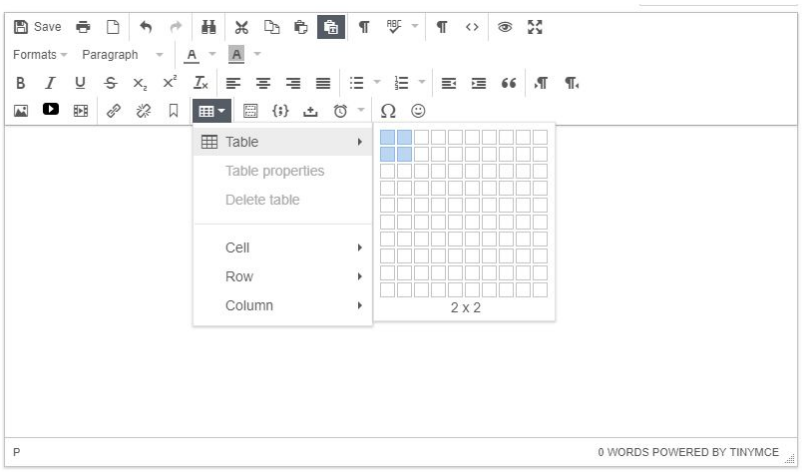
Now we can continue working on our document or save it. When you view the page on the live website, your image will now be on the left with text wrapping around it.

Chapter 7

Working with Tables

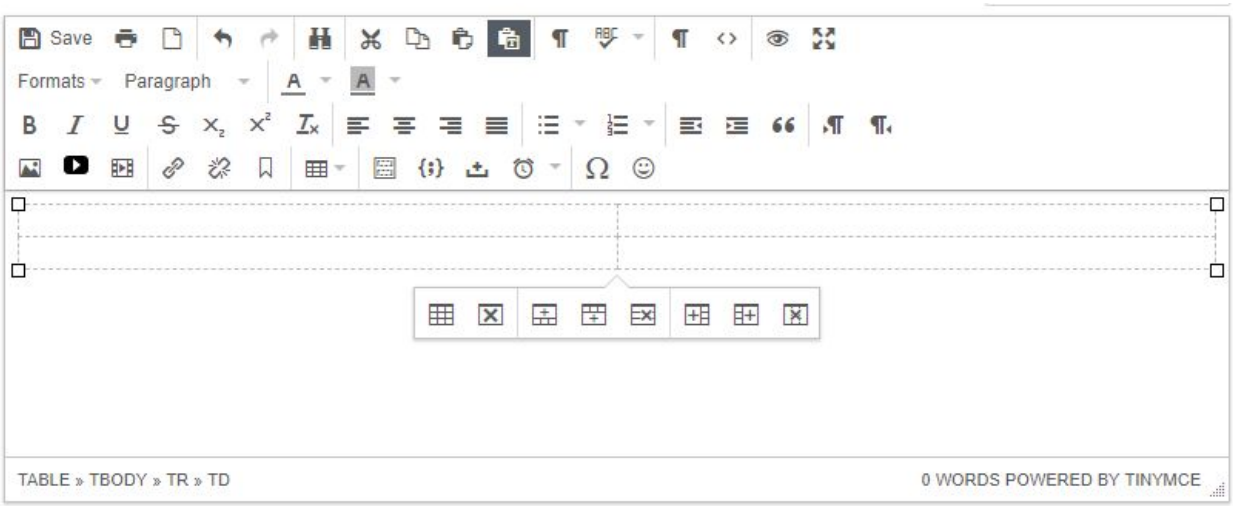
Due to the increasing complexity of what kind of table structures can be made in the editor, this chapter is only meant to introduce you to the tools to work with them in the editor. Remember that tables should only be reserved for tabular data and not for layout of paragraphs and/or images.

To create a new table, we'll choose the **Table button** and then the **Table menu**. A "creation" tool will popup. Select how many rows and columns you'd like to start with. Remember that we can always add or remove them later.



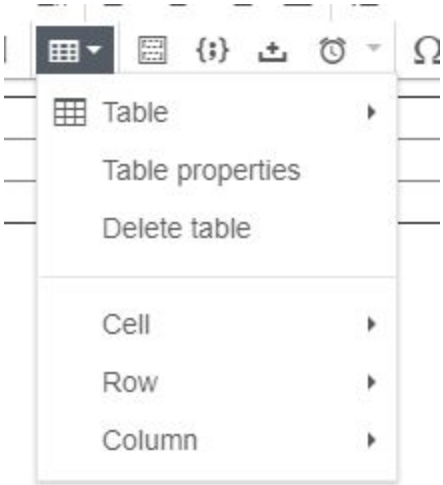
For our example, we'll create a table with 2 rows and 2 columns. Once our size is highlighted, click and our table will be created.

Now that we have a new able, we're presented with a few "quick action" buttons. The first (from the left) is the primary **Table Properties** button. This is where the general table settings exist. The other buttons allow you to quickly add or remove columns or rows.

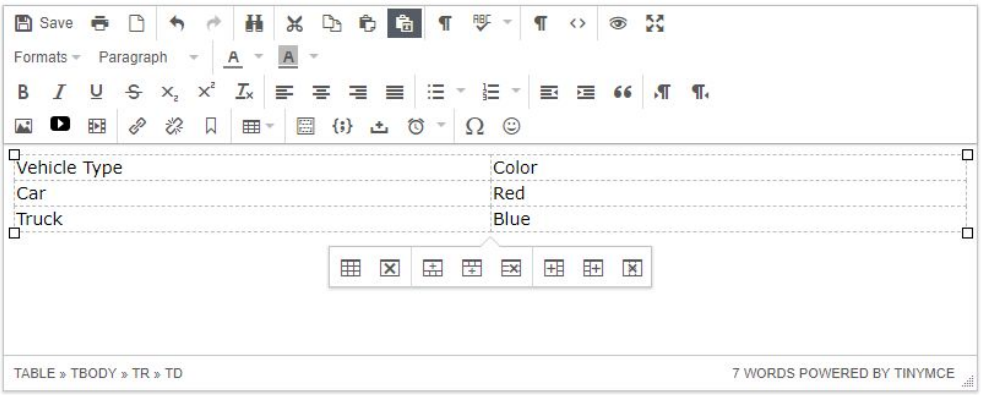


More advanced properties specific to table cells, rows and columns are available under the editor's **Table button**.

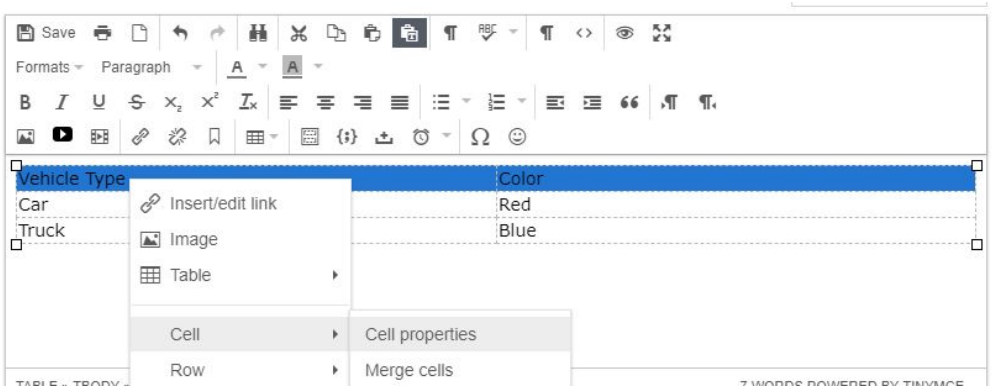
You can also access this menu by right clicking on the relevant item while viewing the table.



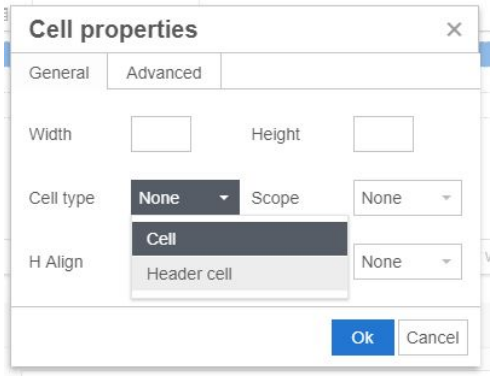
For this example, we've created a table with two columns and three rows. The first row of our table we want to turn into header cells.



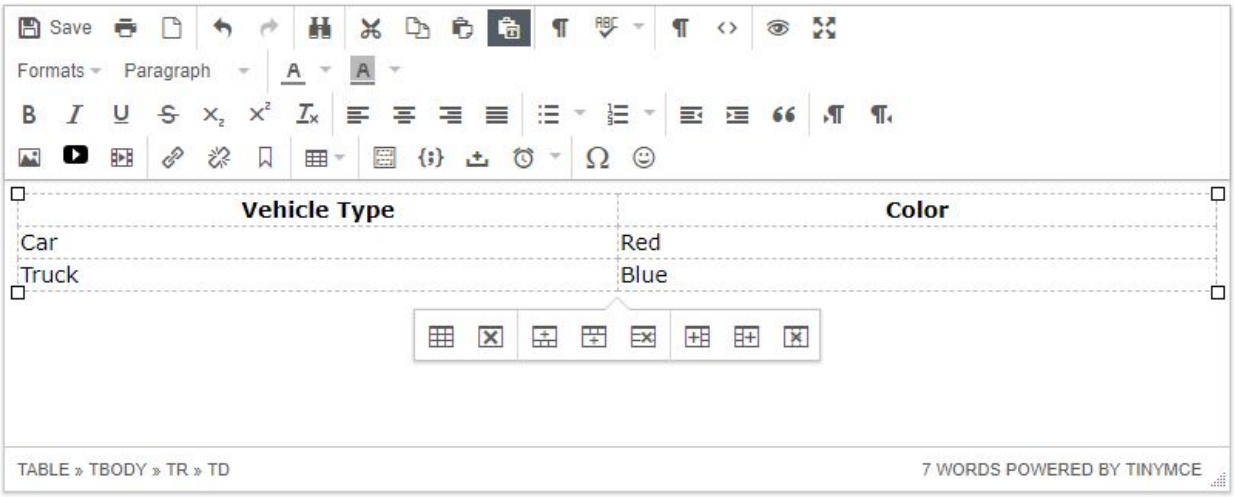
Highlight the cells in the first row**. Right click**, choose **Cell** > **Cell properties**



Change **Cell type** to **Header cell** and click **Ok**



The cells have been changed to header cells and appear centered and bold.



When we view the table on the live website we can see that our header cells have been stylized as a header.

Vehicle Type	Color
Car	Red
Truck	Blue

Note | To aid in viewing data, table rows automatically have “zebra striping” applied. Be aware that building complex tables with rows within rows should be avoided as this can interfere with the appearance of the striping.