



UCT Web Content Management System

Drupal 9

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Module 1: Content Management Systems

Introduction to CMS

Lesson time: 15 minutes



Lesson Objectives:

At the end of this lesson, you will:

- Understand the basic principles of a Content Management System.

Introduction

In a nutshell, a web content management system (CMS) provides contributors a set of tools to create, edit and manage websites. It is underpinned by workflows and content moderation to support work in a collaborative environment.

The UCT Web Content Management System (Web CMS) has been specifically designed to meet the university's web content requirements. This role-based system allows Content Managers to create, edit, upload and change content via the administrative dashboard. No programming/coding experience is needed to use the UCT Web CMS.

Web CMS functionality

All content that is uploaded to the system is stored in a database and can be re-used, re-purposed, published and shared using the online administrator interface. Each webpage is built using one or more of the system's content types.

Advantages

- Using a CMS specifically designed for UCT environment ensures that
- university websites are consistent in layout and presentation, although customisation is possible,
- content is of a high standard, and is organised and managed,
- site development happens faster, and
- staff who do not know HTML can still create and manage websites using the Workbench tools.

Basic capabilities of a CMS

- Provides functionality to manage content via a browser-based CMS interface.
- Assigns user roles and permissions to manage who can create, edit, publish and unpublish content.
- Allows authors with little or no web design background to create, edit and publish content.
- Uses categories and keywords to improve findability.
- Promotes standardisation and consistency across sites.

Structure

Each UCT subdomain is associated with a subsite **e.g.** Faculty of Health Sciences website is a subdomain, with the Department of Medicine website being a subsite to it. Each site exists as its own independent entity, this means that the highest role of a faculty website might not have access to a departmental website which is its subsite, and vice versa. Permissions are applied per site.

Module 2: Web Usability

An overview

Lesson time: 30 minutes



Lesson Objectives:

At the end of this lesson, you will:

- Understand the basic principles of a Content Management System.

Introduction

Web usability refers to the simplicity of using a website. Can people easily navigate to the information they need? Is information displayed in a clear and concise manner? Does your menu structure make sense and is it easy to follow? Does a user find your site useful? These are all the questions you need to consider when creating your site.

The Nielsen Norman group explains that usability and utility goes hand in hand when considering website design and layout. Utility is described as the usefulness of information, while usability is the ease-of-use of a site. Together these two elements determine the usefulness of a site.

User experience

It is important to keep the user in mind when planning and designing a website. Their user experience will determine whether they will return for additional information. When creating a website, think of the target audience and their requirements, abilities, and limitations. The main question you need to answer is, will they find value in what you are offering them on your site. This will enhance the user experience, ensure return visits, and direct more traffic to your site.

Planning your site

Your landing page is the most important page on your site as this determines whether a visitor will continue to browse your site or move on to the next option. A website that looks professional, has easy navigation, and contains up-to-date content functions as an excellent marketing tool. Take the following characteristics into consideration when planning your site. • Clear and attractive design • Navigation • Content • Audience • Speed (avoid huge file size for images and downloadable documents) .

Clear and attractive design

Upon landing on your website, visitors should be able to determine the purpose of your site, the information that is available and how to contact you. Important information should be placed at the top of the page. Keep your layout simple and use well-designed graphics instead of text, to attract and interest the visitor. A good design should add to and not detract from your message.

Navigation

Navigation is an important part of a well-designed site. The key to good navigation is your site organisation. Links to your most important information should be easy to find and frequently tested, especially after updating content or changing the menu placement. Once you've set up good site navigation do not change this as frequent visitors would know exactly where to go to find the information they need. Keep the navigation links the same, but regularly change content to ensure your site remains up to date.

Content

A visitor is looking for quality content that is frequently updated and relevant. Give frequent visitors a reason to come back and they will spread the word about your site – double whammy! Look at the content on your site and create a schedule to update information linked to events and products. There is nothing more frustrating than visiting a website that is still advertising an April event in July. Optimise your site by using well-written and descriptive titles as well as the Subject and Keyword fields in the Reference section of the content types. This ensures that information is always easy to find.

Audience

Always keep your audience in mind when designing your website. The content and design should not only appeal to them, but also provide them with the information they are looking for.

Speed

Time is the one thing we never have enough of. No matter how interesting your site seems, if it takes ages to load you may lose a prospective visitor. This could be caused by the amount and size of images you are using on your website.

When uploading images take the following into consideration:

File format

- SVG - ideal for logos, also has high quality resolution.
- GIF - ideal for logos and small icons, images that have few colours, whereas JPGs handle millions of colours.
- JPG - preferred choice for photographs as it compresses well and has good display qualities.
- PNG - this file format does not lose quality during editing.
- Size - use large graphics sparingly.
- Keep the image size as small as possible. You can easily resize images without losing quality. Image resolution
- If your images are only for display purposes (not required to print), reduce the image resolution to a suitable screen display (72 dpi).

The most important part of a well-designed site is your design plan. Your website is a marketing tool and should be treated as such.

- Update content regularly.
- Upload new and fresh-looking images.
- Include links and tools to ensure visitors get the best experience when using your website.

Module 3: User roles

Roles and permissions

Lesson time: 15 minutes



Lesson Objectives:

In this lesson you will...

- Learn about different user roles
- Learn about different permissions assigned to user roles

Introduction

Visitors to your site are either classified as anonymous or authenticated users. Anonymous users are not required to log in, and can only view published content. This excludes published secure pages, as only authenticated users can view this type of page. Authenticated users have assigned usernames, passwords, permissions and roles. Each role has a collection of permissions assigned to it, which allow users specific access and functionality.

Authenticated users

Below is a list of all authenticated user roles within the UCT Web CMS platform.

- **Editor** has the least level of authority with the ability to modify content and request them for review. They are not able to publish their own content.
- **Super editor (SE)** has a higher level of authority, they can create and edit most content types.

- **Domain Administrator (DA)** has a higher level of authority than super editor and editor, with access to all configuration on the website. They can read and edit all published and unpublished content.
- **Platform Administrator (PA)** has the ultimate permissions at platform level, is not confined to a specific domain. This role can create and delete sites and user roles.

Content Management

					
Permission		Platform Administrator	Domain Administrator	Super Editor	Editor
Article	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
Page	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X*	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
Contact	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	

	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
Album	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
A-Z item	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
A-Z component	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	

					
Permission		Platform Administrator	Domain Administrator	Super Editor	Editor
Notice	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
Notice component	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
Event	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	

					
	Permission	Platform Administrator	Domain Administrator	Super Editor	Editor
Calendar component	Create	X	X	X	X
	Edit own	X	X	X	X
	Edit any	X	X	X	
	Unpublish own	X	X	X	X
	Unpublish any	X	X	X	
	Delete own	X	X	X	
	Delete any	X	X	X	
	Skip workflow	X	X	X	
Webform	Create	X	X	X	
	Edit own	X	X	X	
	Edit any	X	X	X*	
	Unpublish own	X	X	X	
	Unpublish any	X	X	X	
	Delete own	X	X	X*	
	Delete any	X	X	X	
	Skip workflow	X	X	X*	
	Access submission	X	X	**	**

* Excluding locked content

*X if given access

** Access is based on manual assignment.

Multi domain permission

				
Content type	Platform Administrator	Domain Administrator	Super Editor	Editor
Share Content	X	X	X	
Include shared content	X	X	X	
Create domain	X			
Domain settings	X	X		
Create subsite	X			
Subsite settings	X	X		

Module 4: User Interface

Overview

Lesson time: 15 minutes



Lesson Objectives:

In this lesson you will...

- Log into Web CMS
- Understand the user interface

Introduction

Only authenticated users may update site content, and depending on their role may also apply certain configuration tasks and settings to their allocated UCT website. After logging into Web CMS, as an authenticated user you will see the top bar which will indicate the name of your main site, your username used when logging in and the user role assigned to you. This is where you will configure and manage your site and its content via the Dashboard.

Log into Web CMS

To log into UCT Web CMS, from the browser window the user must type in their site URL and append “/user”, e.g. <https://www.uct.ac.za/user>

- From the login window, click **Log in using Identity Provider**, this will redirect to UCT Single sign-on.

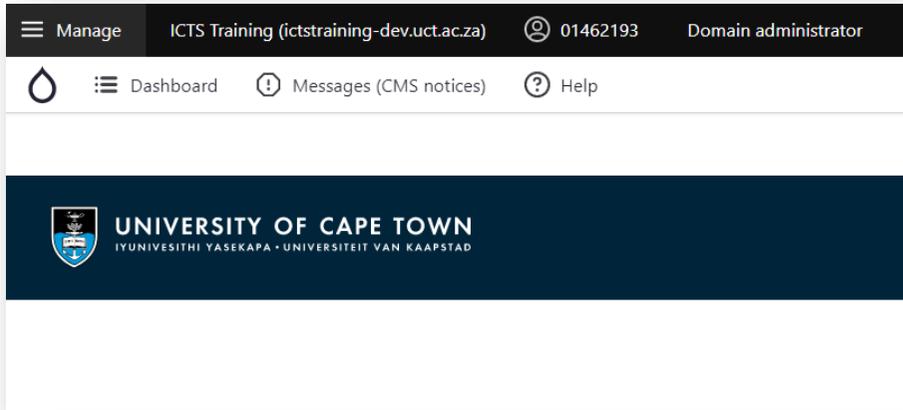


- From the UCT Single Sign-on, log in using your **staff number** and network **password**.

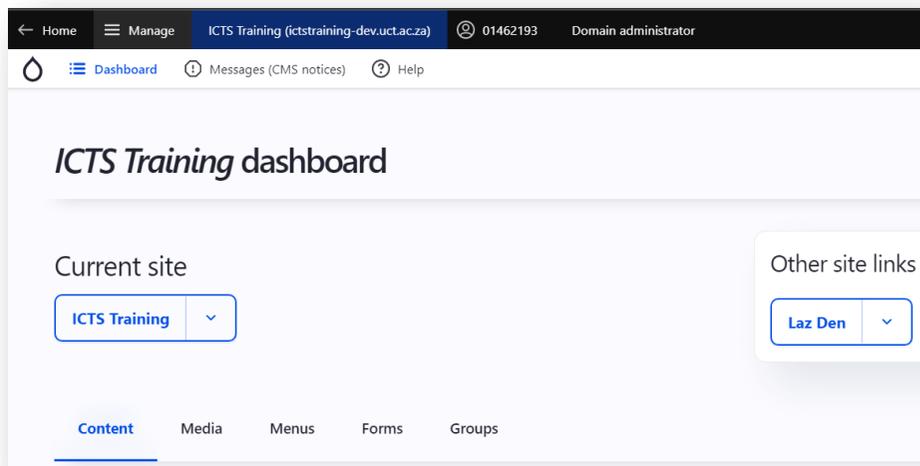
Site User Interface

Once the user successfully logs in, they will be presented with the screen below. This enables the user to view, perform and manage various configuration tasks and settings. Let us navigate the User Interface features.

- **Manage:** allows you to show or hide the dashboard bar below.



- **Dashboard:** is where all the site configuration, settings and content are managed.
- **Messages (CMS notices):** is where you can see system notifications e.g. bugs, and resolutions thereof. These system CMS notices can appear above the login area or accessed via the Manage toolbar.
- **Help:** provides various Web CMS related help topics to navigate.
- **Current site:** reflects the name of the active site, where you will be updating content and/or applying configuration and setting.
- **Other site links:** reflects other sites you may have access to, to switch this to Current site, click the site name.



Module 5: Content Types

Content types

Lesson time: 10 minutes



Lesson objectives:

In this lesson you will learn about different content types.

What is a content type and why do we make use of it?

A content type is the classification of an information entity that is structured, standardised and reusable. It is used to describe a family of related things. Think of your local library – the main items you'll find in the library is books. There are also items like journals, magazines, newspapers, puzzles and multimedia. Each of these can be classified as a content type.

Every content type has a set of attributes. Each attribute has a name and will hold a value. The value it can hold/is assigned to it, can be constrained. Let's look at a content type we are all familiar with – an article. This can be an article in a newspaper, your favourite magazine or or your go-to online news platform.

How do we spot an article? It will, generally, have a title, author, date it was written, images/video and text structured to tell us a story. The points listed above is the attributes that we associate with the content type – Article. To be correctly re-used these 'points'/attributes will have a name and a text or number value can be associated with it. As mentioned earlier, an attribute can be constrained - for example, the date field can only contain a date and not the author's name etc.



Content need to be edited, validated, managed, searched and organised

Why is it important to use content types?

Apart from its re-usability, content types provide structure which in turn provides a better user experience - the golden ticket to have visitors return to our sites.

It not only offers the reader a pleasurable and consistent experience. Content types provide the content creator, content managers and developers a unified language, simplified workflow and opportunity to reuse information. The value it offers the machine (e.g. search engine) is searchability and automation.

Does the use of content type hinder content manager's creativity?

Not at all. It provides structure and in our article example, layout consistency. It is the attribute value input that will make every application unique while adhering to our brand message and offer our audience/reader brand familiarity and consistency.

UCT Web CMS – content types

A UCT website is made up of a collection of webpages which provides news and information about - a UCT entity, projects, degrees, courses, products, services, contact details, and more. Each webpage contains text, images and in some instances, video and/or audio files.

Each content item is referred to as a node, and each node belongs to a content type. Each content type has default settings which are applied to every node associated to that type. In the UCT Web CMS, there are two main content types – **holder content types** and **item content types**.

Holder content types list or group **item content types**. The main difference between the two is that a **holder content type** can be independently displayed with its own URL, while **item content types** are inserted within the components section of a **holder content type**.

Holder content types

- **Page:** used to create and present most nodes within the UCT Web CMS. It uses different widgets to display content types, except articles and events.
- **Article:** ideal for time-sensitive content like news articles, blogs or press releases that contain information, such as current issues, relevant to UCT.
- **Album:** allows images, audio and videos to be placed in a specified folder. They are imported as media entities into Web CMS. Once created, albums can be shared to other domains, making it easy to be referenced from other domains and content types.

Item content types

- **A-Z Item:** referenced, pulled into and presented by the A – Z list container paragraph type. Paragraph types are discussed in more detail later.
- **Notice item:** stores messages used to notify the UCT community of various projects and activities underway. Notices are sorted, categorised and contained in the notice board content type.
- **Event:** displays events that are hosted by or in collaboration with UCT. These could be one day or recurring events.
- **Contact:** capture a UCT employee's contact information, or someone associated with UCT.
- **Vacancy:** store and display job vacancies at UCT, or organisations associated with UCT.

Custom entity/content types

- **Includes:** stores reusable content, which can be referenced from any long text field.

Module 6: Content - Article

Add an article

Lesson time: 30 minutes



Lesson objectives:

In this lesson you will be able to create and edit articles using the **Add Content** feature on the Web CMS **Dashboard**.

Introduction

A website is made up of a collection of webpages which provides information about an organisation. For example, a UCT website would have an About page, or pages about projects, degrees, courses on offer, services available, contact details and more.

A page generally contains text, images and in some instances, video and/or audio files. Webpages can either be static, meaning that the content remains the same (e.g., Contact Us or About pages), or dynamic, where content are regularly updated.

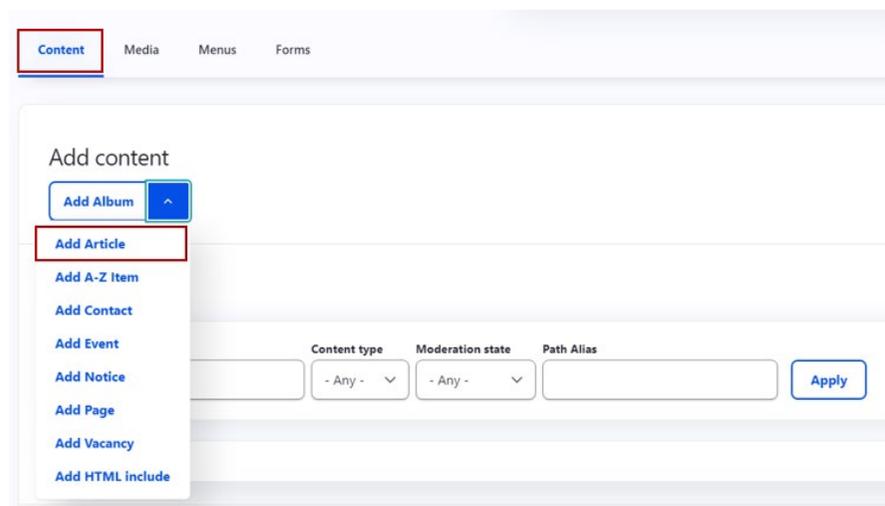
The UCT Web CMS uses various content types to populate webpages. The **Articles** content type is used for current or time-sensitive content such as news or press releases that are relevant to the UCT community, faculty or department. Articles can be added via the **Add Content** option, which is available from the Web CMS Dashboard.

Characteristics of an article

- Each article can have a maximum of four authors (e.g., **writer, photographer, videographer, director**).
- Articles can be scheduled.

How to add an article

1. Log on to the Web CMS Dashboard and select the site you will be updating. Always ensure it is the **Current site**.
2. Click the **Content** tab > **Add content** dropdown menu > **Add Article**.



- Enter the following information in the **Title and setup** tab
 - **Headline:** this is the title of the article and appears in front of the banner image. It is also used for metadata, URL structure and Web CMS listing.
 - **Add an author:** select an existing or new author for the article.
 - **Add a new author** – use this option to add an author who has never been added to the UCT Web CMS before.
 - a. **Author picture:** upload a picture of the author.

- b. **Title:** select an applicable title, or **other** to specify a different title.
 - c. **First name**
 - d. **Initials**
 - e. **Last name:** this is a required field.
 - f. **Bio:** add information about the author.
 - Click **Create Author** to complete this process. Click **Add new author** to add additional authors and complete the required fields.
 - Click **Add existing author:** this option allows you to add an existing author listed on the UCT Web CMS
 - **Author:** enter the author’s name, and select their details from the dropdown suggestions.
 - Click **Add author** to complete this process. Click **Add existing author** to add more author(s) and complete the required fields.
 - Select the applicable **Category** from the dropdown list that the page belongs to. This option classifies your content as well as groups it for the A-Z lists.
 - **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
 - **CTA (Call-to-action) button text:** this appears as link text on the button when the article is displayed in **Carousel View Mode**.
 - **CTA (Call-to-action) URL:** this is a link to the article. If you’re linking to a content on the same website, start typing a content title and select the option from the dropdown suggestions.
3. Complete the following actions in the left side panel:
- Click **Copy and components**.
 - **Summary:** A short blurb (240 characters max) about the article to entice the reader to continue reading. It appears below the headline on the **Carousel and Card view modes**.
 - **Body:** This is the main article, which is displayed in a WYSIWYG editor, that allows for basic formatting, styling and media embedding.
 - Click **Image**.
 - **Select image:** upload applicable images from your computer or use those available in the Web CMS media library.



URL Alias

- *It’s recommended^{??} to keep the system generated **URL***

- Click **Aside**.
 - Activate **Display “Related news”**: the right side column is displayed and lists related news on the full-page version of the current article.
 - Click **Search**. Enter additional keywords for more relevant, granular and improved search results for this article.
- 4. On the right side panel:
 - **Create new revision**:
 - **Revision log message**: log recent updates made to this content.
 - **Current state**: shows the current state of the content.
 - **Change to**: change the content state to either **draft**, **published** or **unpublished**.
 - **Delete**: remove content.
 - **Meta tags**: added by default and should be sufficient for most pages. These can, however, be customised per node and overwrite default settings. All provided tags are used as this content’s descriptors by various search engines, social media platforms and content sharing services that it was shared to.
 - **Node lock**: when activated those in lower roles are unable to update or edit content. **Archive**: activating this feature prevents the article from being displayed on other content’s **Related news**, **Similar content**. etc.
 - **URL alias**: automatically generated, but can be replaced with the current node’s title under the **Domain-specific path** text field.
 - **Authoring information**: automatically populated with the authenticated author’s staff number, and authoring date and time.
 - **Promotion options**
 - **Promoted to front page**: This is not currently in use, although it is a default Drupal feature.
 - **Sticky at top of lists**: when enabled, content is placed at the top of lists or wherever it appears. This order takes precedence over other sorting options such as alphabet or date.
 - **UCT sitemap**: adds this node to the sitemap’s navigation when enabled.

Module 7: Content - Contact

Add a contact

Lesson time: 20 minutes



Lesson objectives:

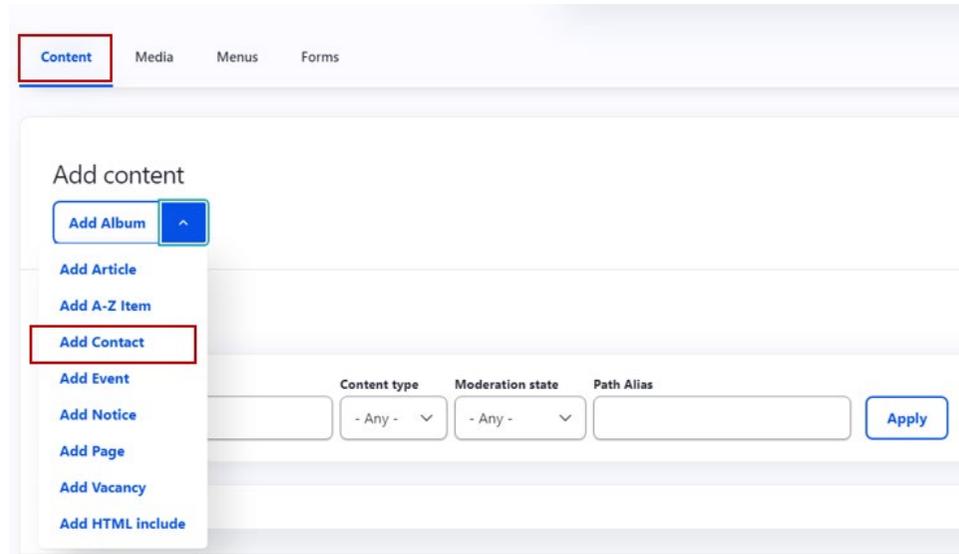
- In this lesson you will create and edit a contact using the **Add Content** feature on the Web CMS **Dashboard**.

Introduction

The **Contact** content type is used to capture an individual's contact information. This could be a UCT employee or someone associated with the university.

Add a contact

1. Log on to the Web CMS Dashboard and ensure that the site you select is the **Current site**.
2. Click the **Content** tab > **Add content** dropdown menu > **Add Contact**.



- Enter the following information in the **Personal details** tab:
 - **Add a new file:** browse to upload an image of the contact and provide alternate text for the image.
 - **Title:** select the title from the dropdown list, or **other** to specify a different title.
 - **First name**
 - **Initials**
 - **Surname:** this is a required field.
- 3. Complete the following steps in the left side panel:
 - Click **Meta**.
 - **Job title:** specify the job title.
 - **Bio:** enter information about the author.
 - **Faculty:** select an option from the dropdown list, if applicable.
 - **Department:** specify, if applicable.

– **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).

- Click **Contact**.
 - **Email:** provide the contact’s email address, if available.
 - **Contact number(s):** provide their contact numbers, if available.
 - Click **Add another item** to provide additional contact number(s).
- Click **Location**.
 - **Map:** enter the iframe code from Google Maps.
 - **Address:** Enter the physical address.
- Click **Website & social**.
 - **URL:** provide a website URL to a personal blog or faculty or departmental website (e.g., `http://www.facultyname.uct.ac.za`).
 - **Link text:** hyperlinked text (e.g., **View website**)
 - Add a new or existing **social media** link:
 - **Add new social media link:**
 - **Label:** text that appears on the website (e.g., **LinkedIn Profile**)
 - **Social media link URL:** points to the respective social media page.
 - Click **Create social media link**.
 - **Add existing social media link:**
 - **Social media link:** start typing the link and select the applicable one from the list.
 - Click **Add social media link**.
 - Click **Researcher** (this applies to researchers only).
 - **Staff number:** Enter the researcher’s staff number.
 - **Profile display:**

- **Default:** This will only show the researcher's title in Converis, while the rest of the information is from the contact created in Web CMS.
- **Converis - Full:** This shows the full bio, contact details and profile picture from Converis, and none of the details provided in Web CMS.
- **Converis – Bio only:** This option only pulls the Converis title and bio, while the rest of the contact details and picture from Web CMS.
- On the right side panel.
 - **Create new revision:**
 - **Revision log message:** log recent updates made to this content (e.g., **Contact number was updated**).
 - **Share preview link:** share link with an individual who is not an authenticated Web CMS user but needs to review content.
 - **Current state:** shows the content's current state .
 - **Change to:** change the content state to **draft, published** or **unpublished**.
 - **Delete:** remove content.
 - **Node lock:** when activated those in lower roles are unable to update or edit content.
 - **URL alias:** automatically generated, but can be changed under the **Domain-specific path** text field. Subsite paths cannot be removed for content that belongs to a subsite. In the event that the alias does not contain the subsite path, the system will automatically generate it.
 - **Promotion options**
 - **Promoted to front page:** This is not currently in use, but is a default Drupal feature.
 - **Sticky at top of lists:** when enabled, content is placed at the top of lists or wherever it appears. This order takes precedence over other sorting options such as alphabet or date.
 - **UCT sitemap:** this node is added to the sitemap navigation, when enabled.

Module 8: Content - Page

Add a page

Lesson time: 20 minutes



Lesson objectives:

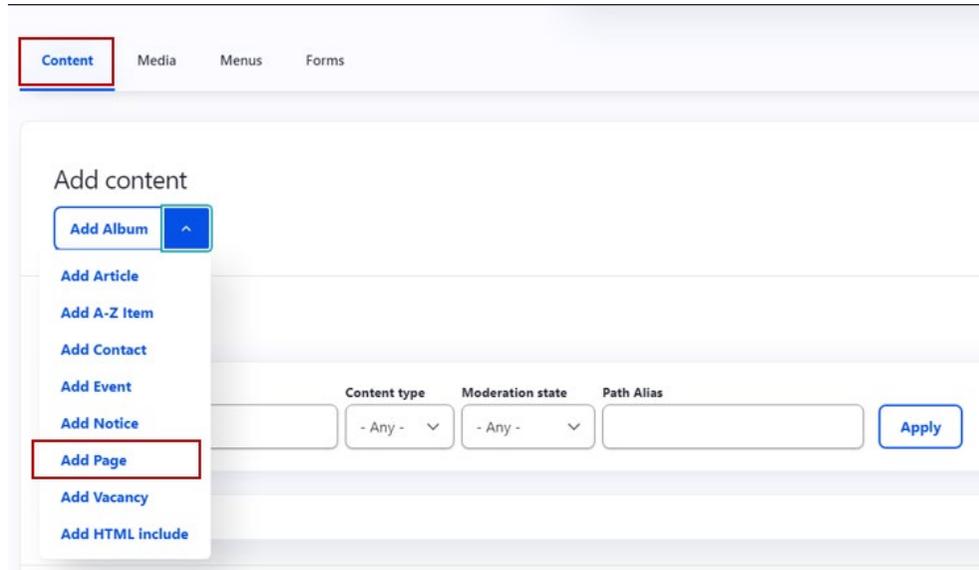
- In this lesson you will create a page and add components using the **Add Content** feature on the Web CMS **Dashboard** as well as edit an existing page.

Introduction

The **Page** content type is used to create various nodes on Web CMS. It uses widgets to display all content types except **Events** and **Articles**.

Add a page

1. Log on to the Web CMS Dashboard and ensure that the site you select is the **Current site**.
2. Click the **Content** tab > **Add content** dropdown menu > **Add Page**.



- Enter the following information in the **Title and setup** tab:
 - **Page title:** this title appears in front of the main image at the top of the page. It is also used for metadata, URL structure and Web CMS listings.
 - **Main image:** appears at the top of the page.
- Click **Add media**
- Either click **Choose File** to upload an image from your computer,
OR
- Search the image library, and sort or filter results by **image type, tags, subsite**.
- Select the applicable image.
 - Select the applicable **Category** from the dropdown list that the page belongs to. This option classifies your content as well as groups it for the A-Z lists.

- **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
- Complete the following actions in the left side panel: Click **Copy and components**.
 - **Summary:** A short blurb (240 characters max) appears below the page title but in front of the main image at the top of the page.
 - **Body:** This is the page’s main content, which is displayed in a WYSIWYG editor, that allows for basic formatting, styling and media embedding.
 - **Aside:** Can be used to display content to the left or right of the body , depending on the selected layout option.
 - **Components:** different page builder elements can be added as individual rows to further enhance the page’s formatting. The following elements, which will be discussed in more detail later, can be added as individual rows:
 - WYSIWYG editor
 - Album
 - Notice board
 - A – Z list
 - Calendar
 - Feedback form
 - Contact group
 - Vacancies
 - Webform
 - Upcoming events
 - Audio
 - UCT multi content reference
 - UCT micro view
 - Click **Hero:** enabling this feature overrides the default breadcrumb settings allowing for manual updates to the breadcrumb trail.
- Click **Layout**.
 - Enable **Navigation aside:** activates the page’s side menu.

- Available layouts:
 - Default
 - 2 Column – Aside left
 - 2 Column – Aside right
 - 3 Column
 - Full width
- Click **A-Z list item**.
 - **A-Z item**: enable this feature to register the page as an A-Z list item.
 - **Link option**: select your preferred way of opening the page from the A-Z list.
 - **Alternative URL**: if the page is a place holder for something, provide a redirect URL .
- Click **Search**.
 - Enter additional keywords for more relevant, granular and improved search results for this article.
- Click **Advanced**.
 - If a script has been developed for something, select it from the **library** dropdown list.
- 3. Complete the following actions in the right side panel.
 - **Create new revision**:
 - **Revision log message**: log recent content updates.
 - **Share preview link**: share link with an individual who is not an authenticated Web CMS user but needs to review content.
 - **Current state**: existing content state.
 - **Change to**: change the content state to **draft**, **published** or **unpublished**.
 - **Delete**: remove content.
 - **Menu settings**: enable this feature to add a page directly to a menu item.
 - **Security**: allows the page to be password protected. Any user attempting to access this page is prompted to enter a password before viewing this content, unless the user role has permission to bypass authentication.
 - **Meta tags**: added by default and should be sufficient for most pages. These can, however, be customised per node and overwrite default settings. All provided tags are used as this content's descriptors by various search engines, social media platforms and content sharing services that it was shared to.

- **Access groups:** if specific groups within UCT need to access this page, they would have to authenticate to view its content (e.g., **Staff** or **Student** login).
- **Node lock:** enable this feature to prevent those in lower roles from editing or updating content.
- **Archive:** enable this feature to hide this page from other content's **Related news** or **Similar content**.
- **URL alias:** automatically generated but can be replaced with the current node's title in the **Domain-specific path** field.
- **Authoring information:** automatically populated with the authenticated author's staff number, and authoring date and time.
- **Promotion options**
 - **Promoted to front page:** This is not currently in use, but is a default Drupal feature.
 - **Sticky at top of lists:** places this content at the top of lists or wherever it appears, when enabled. This order takes precedence over other sorting options such as alphabet or date.
 - **UCT sitemap:** adds this node to the sitemap navigation, when enabled.

Module 9: Content - Album

Add album

Lesson time: 20 minutes



Lesson objectives:

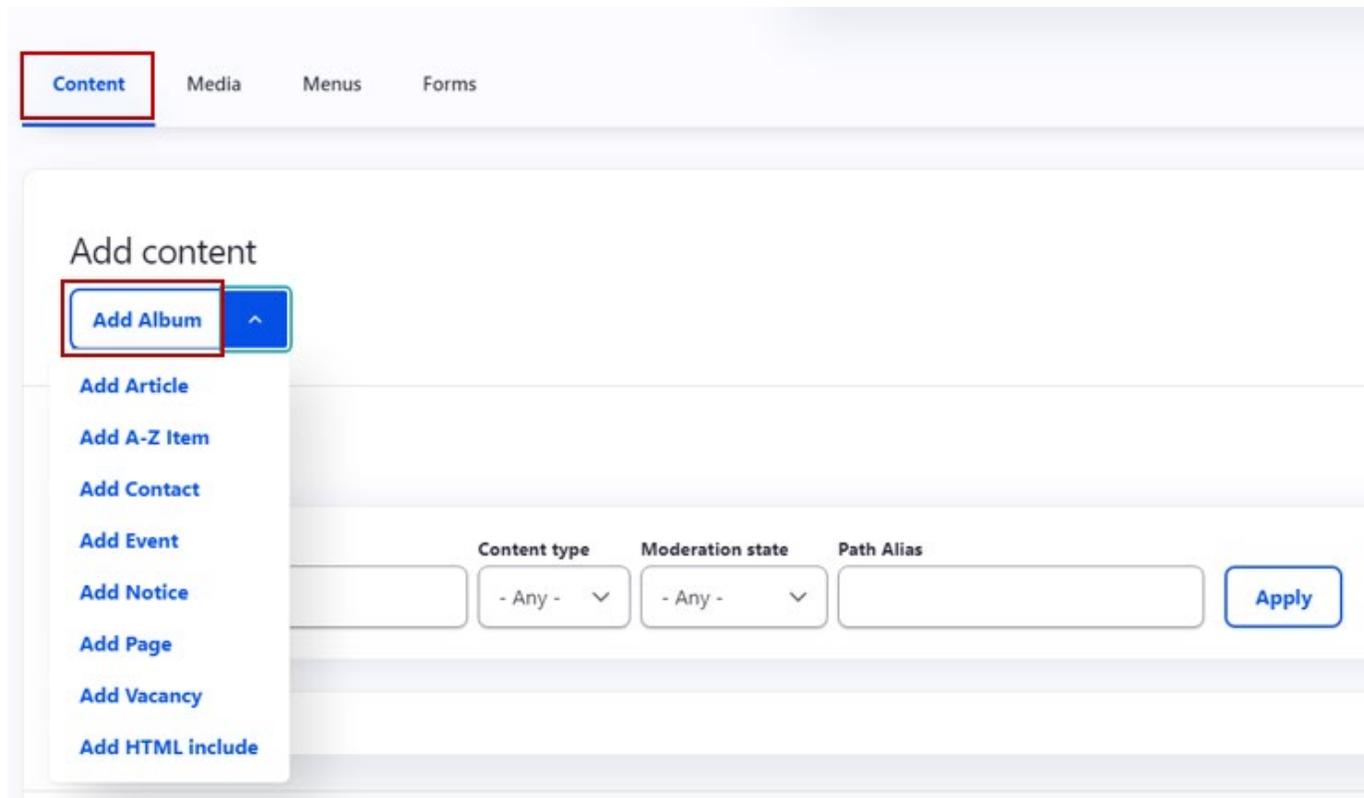
- In this lesson you will create an album using the **Add Album** feature and edit an existing album on the Web CMS Dashboard.

Introduction

Album allows images, audio and videos to be placed in a specified folder. They are then imported into Web CMS as media entities. Once created, albums can be shared to other domains, making it easy to reference from other domains and content types.

Add album

1. Log on to the Web CMS Dashboard and ensure that the site you select is the **Current site**.
2. Select the **Content** tab > **Add content** dropdown menu > **Add Album**.



- Enter the following information in the **Copy and setup** tab:
 - **Album name:** this name must clearly describe the album’s contents, making it easier to find when referenced from other content types.
 - **Body:** define or describe what the album is about.
 - **Tags:** these keywords, separated by a comma, are used to describe and improved findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
- Complete the following actions in the left side panel: Click **Media**.

- **Upload new image:** upload an image from your computer. The image size must not exceed 20MB, and must be either a PNG, GIF, JPG or JPEG. **Alternative text:** a short description of the video, which is used by screen readers for people with impaired vision.
- **Name:**
- **Caption:** provide a caption for the image.
- **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
- **Body:** provide full description of image.
- Click **Save Image**.
 - After saving the first image, click **Select media**, to upload additional images, videos or audio files. Alternatively, search the media library using the **image type**, **tags** and **subsite** filters to choose multiple files for inclusion in your album.
- **Upload new video:** upload a video from your computer that is not bigger than 20MB in size. Only MP4, AVI, MPEG or OGV file types are allowed.
- **Alternative text:** a short description of the video, that is used by screen readers for people with impaired vision.
- **Name:**
- **Caption:** provide a caption for the video.
- **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
- **Add a new file:** Upload an image to serve as cover art in displays such as cards or teasers. The image size must not exceed 20MB and can only be a PNG, GIF, JPG or JPEG file type..
- **Body:** provide a full description of the video.
- **Alternative text:** short description of the video, that is used by screen readers for people with impaired vision.
- Click **Save video**.
 - After saving the first video, click **Select media** to upload additional images, videos or audio files. Alternatively, search the media library by using the **image type**, **tags**, or **subsite** filters to choose multiple files for inclusion in your album.



Images:

- *Always optimise images.*
- *Only up to 20 mb per file is permitted.*
- *Only files with .png , .gif, .jpg, .jpeg extensions are permitted.*



Video:

- Only up to 20 mb per file is permitted.*
- Only files with .mp4, .avi, .mpeg, and .ogv extensions are permitted.*

- **Upload new audio:** upload audio from your computer. Only MP3, WAV and AAC file types are allowed. The file size may not exceed 20MB.
- **Description:** can be used as the link label for the audio file.
- **Name:**
- **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
- **Add a new file:** upload an image to serve as cover art. The image size must not exceed 20MB and can only be a PNG, GIF, JPG or JPEG file type..
- **Alternative text:** short description of the audio, that is used by screen readers for people with impaired vision.
- **Body:** provide a full description of the audio file.
- Click **Save entity**.
- **Create new remote video:** upload audio from your computer that does not exceed 20MB in size and is either a MP3, WAV, or AAC file type.
- **Remote video URL:** enter a URL from a video hosting service (i.e., **YouTube** or **Vimeo**).
- **Body:** provide a full description of the audio.
- **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
- Click **Save entity**.
- In the left side panel, click **Advanced**.
 - **Library:** contains various scripts with specific functionality that can be used for this content type.
 - **Add Custom css/js library:** advanced users can add Cascading Style Sheets (CSS) and JavaScript.
- **Access:** Select the subsite where this node belongs.
- On the right side panel.
 - **Create new revision:**
 - **Revision log message:** log recent content updates, where applicable.
 - **Save as:** change the content state to either **draft**, **published** or **unpublished**.



Audio files:

*Only up to 20 mb per file is permitted.
Only files with .aac , .mp3 and .wav extensions are permitted.*

- **Meta tags:** added by default and should be sufficient for most pages. These can, however, be customised per node and overwrite default settings. All provided tags are used as this content's descriptors by various search engines, social media platforms and content sharing services that it was shared to.
- **Node lock:** activating this feature prevents those in lower roles from editing or updating content..
- **URL alias:** automatically generated, but can be replaced with the current node title in the **Domain-specific path** field.
- **Authoring information:** automatically populated with the authenticated author's staff number, and authoring date and time.
- **Promotion options**
 - **Promoted to front page:** This is not currently in use, but is a default Drupal feature.
 - **Sticky at top of lists:** places this content at the top of lists or wherever it appears, when enabled. This order takes precedence over other sorting options such as alphabet or date.
- **UCT sitemap:** adds this node to the sitemap navigation, when enabled.

Module 10: Content - Event

Add event

Lesson time: 20 minutes



Lesson objectives:

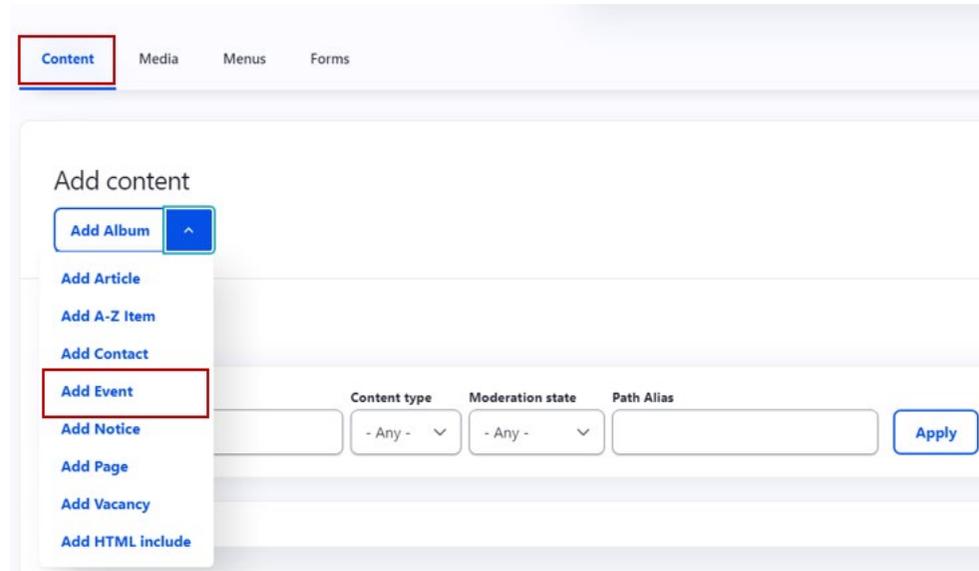
- In this lesson you will create an event using the **Add Content** feature and editing an existing event via the Web CMS Dashboard.

Introduction

The **Event** content type is used to display events that are either hosted by UCT, or held in collaboration with UCT. These could be single day or recurring events.

Add event

1. Log on to the Web CMS Dashboard and ensure that the site you select is the **Current site**.
2. Click the **Content** tab > **Add content** dropdown menu > **Add Event**.



- Enter the following information in the **Title and setup** tab:
 - **Event name:** the name of the event that is also used for metadata and URL structure.
 - **Type:** Select the event type from the dropdown list.
 - **Select image(s):** upload applicable images from your computer or select from the Web CMS media library.
 - **Venue:** Start typing the event venue's name and select the applicable option from the list. Alternatively, create a new venue by entering the venue details, which will be added when saving the event.
 - **Date:** Set the start and end date.
 - **Start:** schedule start date and time.
 - **End:** specify the end time of the event for the selected date.
 - **All day:** this only applies to full day events. Select the box, if applicable.

- **Duration:** this is auto-filled with **Custom** for events that are not 30, 60, 90, or 120 minutes long. Alternatively, after specifying the start time, select the duration from the predefined list (up to 2 hours). This will auto-fill the end time.
 - **Repeats:** select the frequency (never, day, week, month, year) for recurring events, where applicable..
 - **Ends:** select the end date for recurring events (i.e., date-based or after number of occurrences).
 - **Advanced:** select this option if the event recurrence takes place on certain days, and specify the recurrence behaviour.
 - **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
 - **URL:** link to an external website related to this event or to a node within this website.
 - **Link text:** Text to appear on the button linking to the URL field.
3. Complete the following tasks in the left side panel.
- Click **Copy and info**.
 - **Summary:** A short blurb (240 characters max) that is displayed below the title in **Teaser** view mode.
 - **Body:** the event’s main body text, which appears in **Full Node** view mode.
 - **Additional information:** appears in **Full Node view** mode when the user views more information.
 - **Contact information:** provide contact information for RSVP or enquiries.
 - Click **Search**.
 - Enter additional keywords for more relevant, granular and improved search results for this article.
 - **Access:** Select which subsite this node belongs to.
 - On the right-side panel:
 - **Create new revision:**
 - **Revision log message:** log recent content updates, where applicable.
 - **Save as:** change the content state to either **draft, published** or **unpublished**.
 - **Node lock:** enable this option to prevent lower roles from editing or updating content .
 - **URL alias:** automatically generated, but can be replaced with the current node’s title in the **Domain-specific path** field.
 - **Authoring information:** automatically populated with the authenticated author’s staff number, and authoring date and time.
 - **Promotion options**

- **Promoted to front page:** This is not currently in use, but is a default Drupal feature.
- **Sticky at top of lists:** places this content at the top of lists or wherever it appears, when enabled. This order takes precedence over other sorting options such as alphabet or date.
 - **UCT sitemap:** adds this node to the sitemap navigation, when enabled.

Module 11: Content - Notice

Add notice

Lesson time: 15 minutes



Lesson objectives:

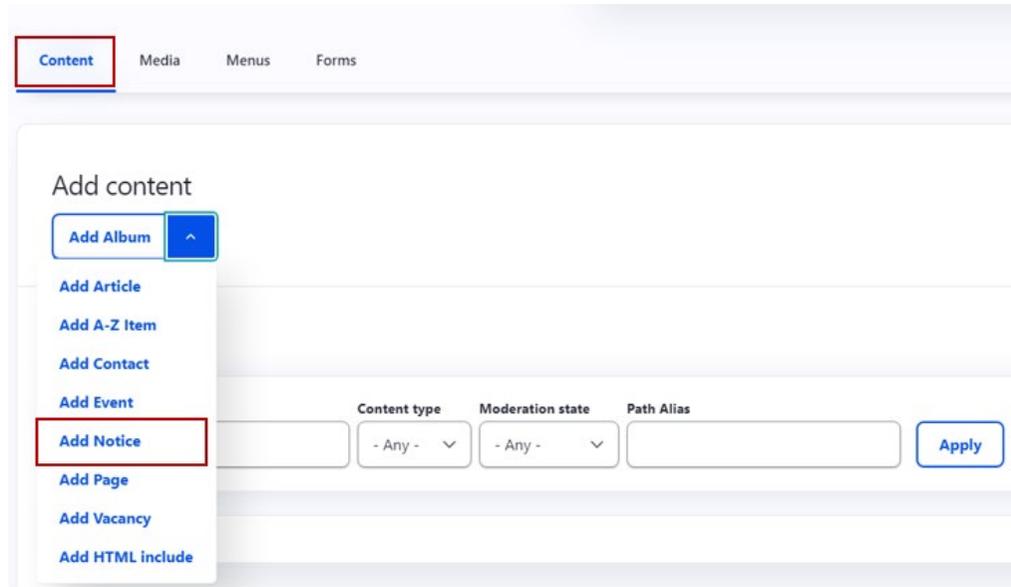
- In this lesson you will create a notice using the **Add Content** feature, and edit an existing notice on the Web CMS Dashboard.

Introduction

Notices are contained in notice boards. When creating a notice, it is important to use a type list that matches the notice to ensure it appears on the applicable notice board. Start and end dates determine how long the notice will be visible on a website.

Add notice

1. Log on to the Web CMS Dashboard and ensure that the site you select is the **Current site**.
2. Click the **Content** tab > **Add content** dropdown menu > **Add Notice**.



- Enter the following information in the **Title and setup** tab
 - **Notice title:** ts displayed on the notice board, and is used for metadata.
 - **Type:** Sselect the applicable option based on the nature of the notice. .
 - **Date:**
 - **Start date:** the date this notice appears on the notice board.
 - **End date:** the date this notice is removed from the notice board.
 - **Tags:** these keywords, separated by a comma, are used to describe and improve findability of your content. They are also taxonomy reference fields to group content from different categories. Multi-word phrases can be enclosed in inverted commas for precision (e.g., “teaching and learning”).
 - **Sticky at top of lists:** , places this notice at the top of the notice board, when enabled, irrespective of the ordering and/or filtering applied to the notice board.

- On the left-side panel, click **Copy and Content**.
 - **Body**: full body text that appears on the page.
 - **File(s)**: upload applicable file(s) related to this notice.
- **Access**: select which subsite this node belongs to.
- On the right-side panel:
 - **Create new revision**:
 - **Revision log message**: log recent content updates, where applicable.
 - **Save as**: change the content state to either **draft**, **published** or **unpublished**.
 - **Node lock**: enabling this option prevents those in lower roles from editing or updating content.
 - **URL alias**: automatically generated, but may be replaced with the current node's title in the **Domain-specific path** field.
 - **Authoring information**: automatically populated with the authenticated author's staff number, and authoring date and time.
 - **Promotion options**
 - **Promoted to front page**: **This is not currently in use**, but is a default Drupal feature.
 - **Sticky at top of lists**: places this content at the top of lists or wherever it appears, when enabled. This order takes precedence over other sorting options such as alphabet or date.
 - **UCT sitemap**: adds this node to the sitemap navigation, when enabled.

Module 12: Content - Vacancy

Add vacancy

Lesson time: 15 minutes



Lesson objectives:

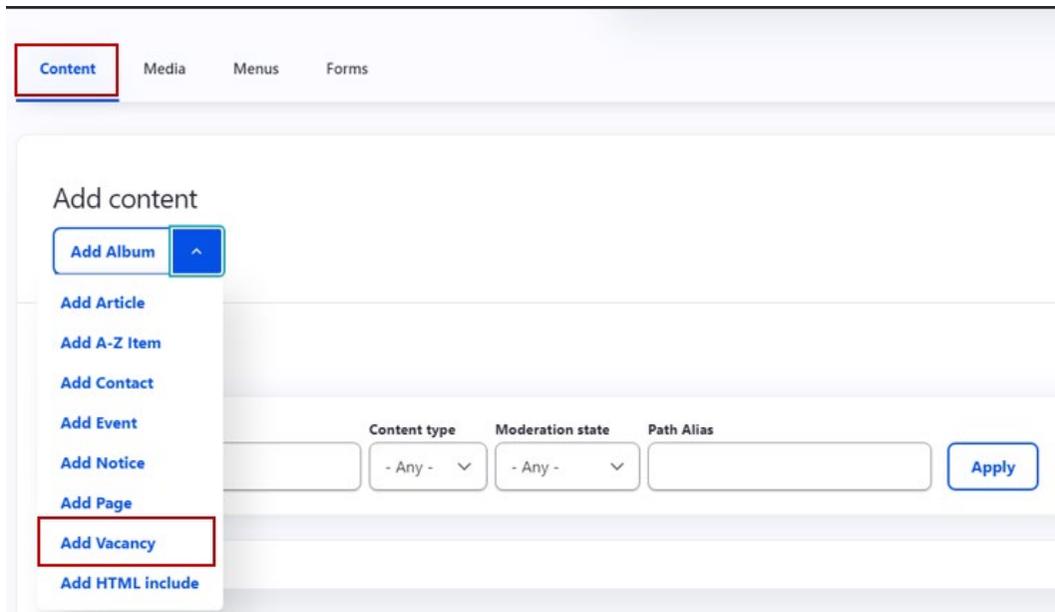
- In this lesson you will create a vacancy using the **Add Content** feature, and edit an existing vacancy on the Web CMS Dashboard.

Introduction

The **Vacancy** content type is used to store and display job vacancies at UCT or organisations associated with UCT. A vacancy cannot exist on its own, instead it is placed in a vacancy table which is a component that can only be added on a page. Vacancies are either internal or external and are set as such in Web CMS. Internal vacancies are only accessible to UCT staff and students, while external vacancies are accessible to the general public.

Add vacancy

1. Log on to the Web CMS Dashboard and ensure that the site you select is the **Current site**.
2. Click the **Content** tab > **Add content** dropdown menu > **Add Vacancy**.



- Enter the following information in the **Copy and setup** tab:
 - **Job category:** select the applicable category that the vacancy belongs to.
 - **Position:** the vacancy's job title.
 - **Job description:** Upload the job description file .
 - **Advert:** Upload the job advert file.
 - **Display Control:** determine where the vacancy should be displayed. **Internal** is only visible to authenticated users (**Staff/Students**), while **External** is visible to the public.
- On the left-side panel, select **Meta**:
 - **UCT entity:** a department within UCT.
 - **Add new UCT entity:** create a department if it is not readily available in Web CMS.
 - **Add existing UCT entity:** start typing the department name, then select the relevant one from the available list.

- **Faculty:** select which faculty the vacancy is being advertised in.
- **URL:** insert a link to the school or department where this vacancy is being advertised.
- **Link text:** the button text linking to the URL field above (School or Department name).
- **Closing date:** specify the end date to submit applications.
- **Access:** select the applicable subsite the node belongs to.
- On the right-side panel:
 - **Create new revision:**
 - **Revision log message:** log recent content updates.
 - **Save as:** change the content state to either **draft**, **published** or **unpublished**.
 - **Node lock:** enable this option to prevent those in lower roles from editing or updating content.
 - **URL alias:** automatically generated, but can be replaced with the current node's title in the **Domain-specific path** field.
 - **Authoring information:** automatically populated with the authenticated author's staff number, and authoring date and time.
 - **Promotion options**
 - **Promoted to front page:** **This is not currently in use**, but is a default Drupal feature.
 - **Sticky at top of lists:** places this content at the top of lists or wherever it appears, when enabled. This order takes precedence over other sorting options such as alphabet or date.
 - **UCT sitemap:** adds this node to the sitemap navigation, when enabled.

Module 13: Content – HTML

Includes

Add HTML includes

Lesson time: duration of lesson in minutes



Lesson objectives:

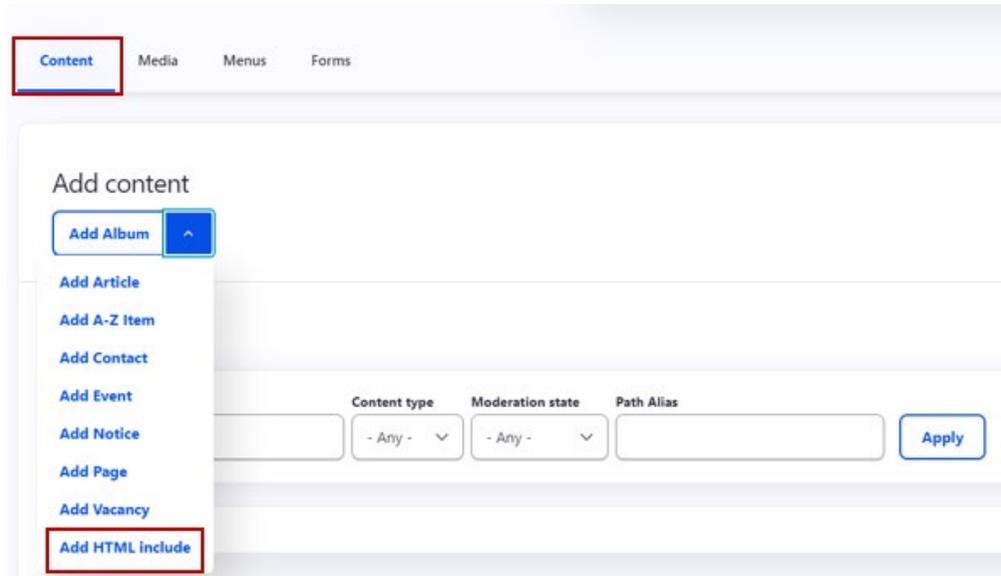
- In this lesson you will create an HTML Include content type.

Introduction

Includes are used to store reusable content that can be referenced from any long text field. For example, if there's a disclaimer or terms and conditions to be displayed on various places on the website through the **WYSIWYG** component, it can be created once then referenced multiple times.

Add an include

1. Log on to the Web CMS Dashboard and ensure that the site you select is the **Current site**.
2. Click the **Content** tab > **Add content** dropdown menu > **Add HTML includes**.



- From the **Copy** tab
 - **Name:** name of the include entity.
 - **Body:** embed the HTML code.
- From the **Advanced** tab:
 - **Library:** presents a list of scripts that have been pre-loaded for use. These libraries perform a variety of automated tasks.
 - **Add custom css/js library:** allows for addition of CSS and JavaScript libraries.
 - **Save as: Draft** or **Published.**
 - Click **Save.**

Module 14: Components

Add a component

Lesson time: 60 minutes



Lesson objectives:

In this lesson you will add components to a node.

Introduction

Components are individual builder elements which can be added to a node or page. These elements are added as individual rows.

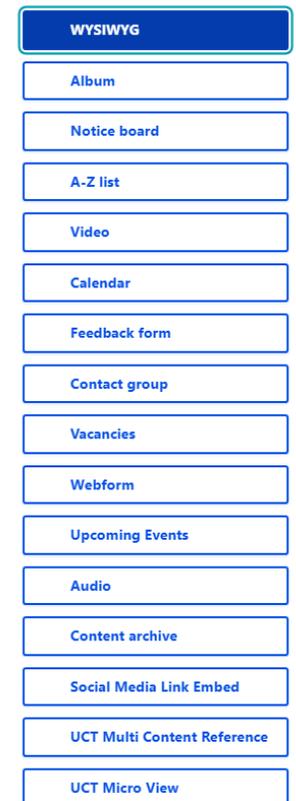
Add a component

- For any content type that supports components, from the **node add/edit form**, locate the **Copy and components** tab on the left-side panel.
- Select the **Add row** button
 - A list of available components for that node type is displayed.



Components:

Components can only be added to page and article content types.



Component types

WYSIWYG editor

This is the most common component type. Its default mode provides an easy way to segment pages by allowing different subsections with subtitles. It comes with standard formatting toolbars, media embed features and HTML editing view. This allows for HTML and scripting code to be used to enhance the content as desired. Expanding the **Advanced** option presents additional features in the WYSIWYG editor. Alignment layout can be assigned (**Left**, **Right** or **Auto** by default).

Album

This is used together with **Album** content nodes. It shows referenced **Album** nodes and provides display options to modify outputs on the holding-type node. Optional subtitles as well as introduction text can be provided via the **Subtitles** and **Intro** fields respectively.

- **Album:** reference an album node that has already been created. Start typing the title and then select the applicable album from the list.
- **Preview mode** provides the following options:
 - **Card:** each image is displayed in **Card** image style.
 - **Carousel:** all album images are wrapped in **Carousel** and presented as **carousel slides**.
 - **Thumbnail grid:** each image is displayed as **Thumbnails**.
- **Media display mode:** this field is used together with the **Preview mode** selection. It displays its outputs as **Gallery modal**, **Gallery Overlay** or **Carousel slide**.
- **Number of items to display:** limits the maximum number of images to be displayed (no limit is applied, by default).

Notice board

This is used to display **Notice** nodes. Additional display and filter options are used to modify output on the holding-type node. Optional subtitle as well as introduction text can be provided via the **Subtitles** and **Intro** fields respectively.

- **Output style:** select the presentation formats below.
 - **Table:** presents a tabular view of notice boards.
 - **Accordion:** presents a compact view, which allows notices to be expanded and collapsed.
- **Advanced** presents filtering options to limit notice outputs:
 - **Types:** filter results by specified types.
 - **Limit by keywords:** filter results using keywords.
 - **Sticky control:** filter results by **sticky** or **non-sticky**. All notices are displayed by default, irrespective of sticky status.
 - **Enable date filter:** reveals a date filter to users.
 - **Enable category filter:** reveals a category filter to users.

A-Z list

This is used together with A-Z items (or pages that have the A-Z item option enabled).

- **Display option:** allows another supported display format to be selected, in place of lists, which is the default setting.
- **Group by category:** listed content in groups is displayed, when enabled.
- **Advanced:** shows additional filtering options
 - **Include self:** enabling this feature allows container content to be included in the A-Z list.
 - **Limit by tags:** lists predefined tags or keywords to limit output.

Video

This is used to display video media content. An optional subtitle can be provided via the **Subtitle** field.

- **Add media**
 - **Remote video**
 - **Add Remote video via URL:** this option requires a third-party video hosting service URL of such as **YouTube** or **Vimeo**.
 - **Alternatively,** browse the media library.
 - **Video**
 - **Choose File:** upload a video from local storage.
 - **Alternatively,** browse the media library.



Video:

Only up to 20 mb per file is permitted.

Calendar

Contains and displays events in calendar style. An optional subtitle can be provided via the **Subtitle** field.

- **Limit by tags:** list tags or keywords to only display events that match the provided criteria.
- **Limit by event type:** only display selected event types on the calendar.
- **Advanced:**
 - **Enable event-type filter:** allows the user to limit results according to the event type specified in the calendar.
 - **Enable date filter:** a user can select the date range of the events they'd like to see on a calendar.
 - **List Display:** shows events in a list instead of calendar style.

Feedback form

Displays a feedback form where an optional subtitle can be provided via the **Subtitle** field.

- **Email:** the email address feedback must be sent to.
- **Form type:** select either **Contact, Feedback,** or **Was this page useful?**

Contact group

This is used to contain, group and display contacts in a holder-type node.

- **Subtitle:** is optional but can be used to specify contact sub-groups (i.e, **Lecturers**)
- **Contact display mode:** the user can select how they want contacts to be displayed (i.e., **card, teaser, table, or full contact** mode).
- **Contacts:** add predefined contact items by typing the first few letters then selecting the applicable option.
- **Add another item:** for additional contact items.
- **Add new contact:** provides a shortcut to create a new contact item.

Vacancies

This is used to contain, group and display vacancies in tabular format.

- **Internal/External:** select whether the vacancy list contains **internal** or **external** vacancies. If **none** is selected, all vacancies are displayed regardless of their scope.

Webform

Displays a webform where an optional subtitle can be provided via the **Subtitle** field.

- **Webform:** select a pre-configured form from the available list.
- **Webform settings:** specify form availability. e
 - **Open:** a form is available and accessible.
 - **Closed:** a form is no longer accessible.
 - **Scheduled:** specify the forms opening and closing dates and times.
- **Default submission data:** default values can be assigned for the form fields, but is optional.

Upcoming events

Displays upcoming events in a teaser style. An optional subtitle can be provided via the **Subtitle** field.

- **Limit by tags:** tags or keywords to only display events that match the provided criteria.
- **Limit by event type:** only selected types will be displayed.

Audio

This is used to present audio media content. An optional subtitle can be provided via the **Subtitle** field.

- **Embed audio:** enable this option to embed third-party audio hosting services HTML (e.g., Soundcloud).
- **Add media**
 - **Choose file:** upload audio from local storage.
 - **Alternatively,** browse the media library.
- **Embed code:** enter HTML code from an audio streaming or hosting service.

Content archive

Group and present past or archived news and events. An optional subtitle can be provided via the **Subtitle** field.

- **Articles (News):** select this option for archived news or articles.
- **Events:** select this option for archived or past events.

Social Media Link embed

This component is used to embed content from third party social media platforms. It only allows for the HTML iframe code to effectively embed content. An optional subtitle can be provided via the **Subtitle** field. Use the **Embed code** text field to paste the iframe code from a third party social media platform.

UCT multi content reference

This component is used to link and display existing articles and pages on this page. Updates made on the original page are updated wherever it has been referenced. Results can also be displayed in a variety of output style and display mode combinations. Carousel output style only supports slide display mode though. An optional subtitle can be provided via the **Subtitle** field.

- **Output Style:** select an option between **grid** and **carousel**.
- **Display mode:**
 - If **Grid** is selected from **Output Style**, then subsequent **Display Mode** options to choose from are **Banner, Card, and Teaser**.
 - If **Carousel** is selected from **Output Style**, the only available option is **Carousel Slide**.
- **Content:** type the page title you want to reference, then choose from the available suggestions.
- **Add another item:** repeat the above steps to display additional content

UCT micro view

Use this component to select, link to and group articles for display within this page. Results can be displayed in a variety of output style and display mode combinations. Carousel output style only supports slide display mode though. An optional subtitle can be provided via the **Subtitle** field.

- **Output Style:** select an option between **grid** and **carousel**.
- **Display mode:**
 - If **Grid** is selected from **Output Style**, then subsequent **Display Mode** options to choose from are **Banner, Card, and Teaser**.
 - If **Carousel** is selected from **Output Style**, then only the **Carousel Slide** option is available .
- **Number of results:** specify total number of results to display (maximum of 100).
- **Offset:** Specify the number of results to skip from displaying.
- **Enable category filter:** enable this feature to allow the user to filter results using active keywords.
- **Limit by tags:** Specify tags or keywords to limit results.

Module 15: Media

Media

Lesson time: 30 minutes



Lesson Objectives:

In this lesson you will...

- Add individual media files.
- Add bulk media files.
- Edit media

Introduction

Media in Web CMS refers to various content of different file types. These files are not created inside Web CMS and cannot be edited within Web CMS, they are only “imported” or uploaded into Web CMS. Media can be used to enhance the content, for example images can be used to improve the presentation of content, while other media files can also be used to further communicate and enrich the experience and content on the website e.g. short videos or documentation like policies etc. This section will demonstrate how to add individual media files.

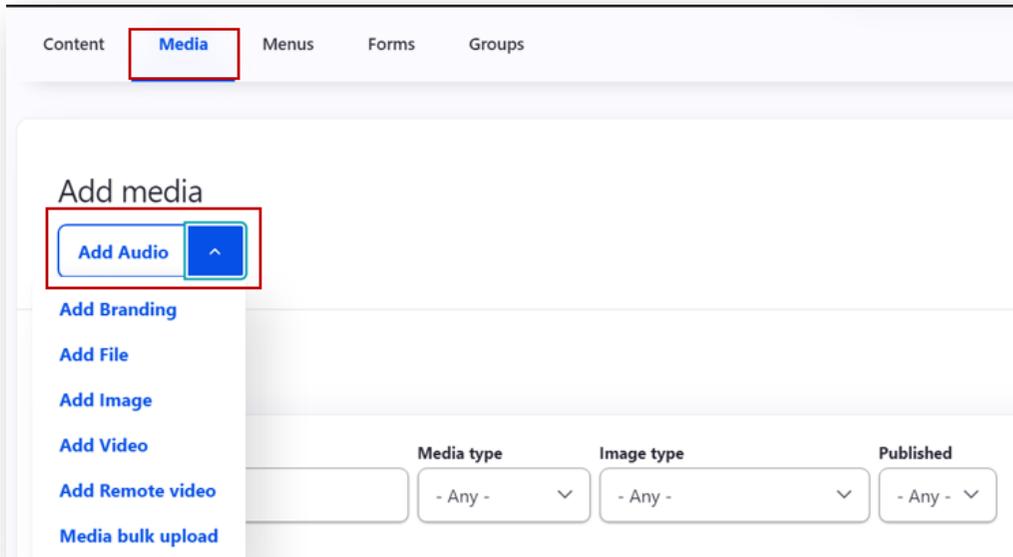


Media

- *This is where policies, manuals, reports, presentation, videos, photos, sound and other files are uploaded.*
- *Always delete outdated files.*

Add media

1. Log on to the Web CMS Dashboard and select the site you will be updating ensuring it is the **Current site**.
2. Under **Current site**, select the **Media** tab from the dropdown next to the site name.



Video files:

Host big video files on an external service (e.g. YouTube, Vimeo etc.)

Add audio

- From the **Add media** dropdown menu, select **Add Audio**.
 - **Add a new file:** upload audio from your computer (up to 20 MB of either mp3 / wav / aac file is allowed).
 - **Name:** This is the name to be allocated within Web CMS, it does not have to be similar to its original file name.
 - **Tags:** these are comma separated keywords used to describe your content, they improve findability of your content. They are also taxonomy reference fields that can be used for grouping content from different categories.



Audio files:

*Only up to 20 mb per file is permitted.
Only files with .aac , .mp3 and .wav extensions are permitted.*

- **Add a new file:** Upload an image that will serve as an album art (up to 20 MB of either png / gif / jpg / jpeg file is allowed).
 - **Alternative text:** required short description of the audio file, important for accessibility, it is used by screen readers for people with impaired vision.
- **Body:** provide body text as full description of this audio.
- **Access:** Specify which website will have access to this audio file.
- **Save.**

Add branding

- From the **Add media** dropdown menu, select **Add Branding**.
 - **Add a new file:** Upload a **vector/transparent** image (up to 20 MB of either png / gif / svg file is allowed).
 - **Name:** This is the name to be allocated within Web CMS, it does not have to be similar to its original file name.
 - **Access:** Specify which website will have access to this image.
 - **Save.**

Add file

- From the **Add media** dropdown menu, select **Add File**.
 - **Add a new file:** Upload a file (up to 20 MB of either txt / doc / docx / pdf / ics / xls / xlsx / ppt / pptx / csv / rtf file is allowed).
 - **Name:** This is the name to be allocated within Web CMS, it does not have to be similar to its original file name.
 - **Tags:** these are comma separated keywords used to describe your content, they improve findability of your content. They are also taxonomy reference fields that can be used for grouping content from different categories.
 - **Access:** Specify which website will have access to this image.
 - **Save.**



Branding:

*Only up to 20 MB file size is permitted.
Only files with .png , .gif and .svg extensions are permitted.*



Files:

*Only up to 20 MB file size is permitted.
Only files with .txt , .doc, .docx, .pdf, .ics, .xls, .xlsx, .ppt, .pptx, .csv,*

Add image

- From the **Add media** dropdown menu, select **Add Audio**.
 - **Add a new file:** Upload an image (up to 20 MB of either png / gif / jpg / jpeg / webp file is allowed).
 - **Name:** This is the name to be allocated within Web CMS, it does not have to be similar to its original file name.
 - **Caption:** Specify caption.
 - **Tags:** these are comma separated keywords used to describe your content, they improve findability of your content. They are also taxonomy reference fields that can be used for grouping content from different categories.
 - **Body:** provide body text as full description of this audio.
 - **Access:** Specify which website will have access to this audio file.
 - **Save.**

Add video

- From the **Add media** dropdown menu, select **Add Video**.
 - **Name:** This is the name to be allocated within Web CMS, it does not have to be similar to its original file name.
 - **Add a new file:** upload video from your computer (up to 20 MB of either mp4 / avi / mpeg / ogv file is allowed).
 - **Tags:** these are comma separated keywords used to describe your content, they improve findability of your content. They are also taxonomy reference fields that can be used for grouping content from different categories.
 - **Add a new file:** Upload an image that will serve as a cover art (up to 20 MB of either png / gif / jpg / jpeg file is allowed).
 - **Alternative text:** required short description of the audio file, important for accessibility, it is used by screen readers for people with impaired vision.
 - **Body:** provide body text as full description of this audio.
 - **Access:** Specify which website will have access to this audio file. **Save.**



Images:

- *Always optimise images.*
- *Only up to 20 MB file size is permitted.*
- *Only files with .png , .gif, .jpg, .jpeg, webp extensions are permitted.*



Video:

- *Only up to 20 mb per file is permitted.*
- *Only files with .mp4, .avi, .mpeg, and .ogv extensions are permitted.*

Add remote video

- From the **Add media** dropdown menu, select **Add Video**
 - **Remote video URL:** You can type/paste a URL from a video hosting service e.g. **YouTube, Vimeo.**
 - **Body:** provide body text as full description of this video.
 - **Tags:** these are comma separated keywords used to describe your content, they improve findability of your content. They are also taxonomy reference fields that can be used for grouping content from different categories.
 - **Access:** Specify which website will have access to this audio file.
 - **Save.**

Media bulk upload

- From the **Add media** dropdown menu, select **Media bulk upload**
- **Select either Documents / Images / Videos**
 - Note the allowed file types and size limit for the selected option.
 - **Dropzone:** drag and drop the files here, alternatively, click **Select files** to upload files from your local storage.
 - **Tags:** these are comma separated keywords used to describe your content, they improve findability of your content. They are also taxonomy reference fields that can be used for grouping content from different categories.
 - Click **Submit.**
 - **Access:** Specify which website will have access to this audio file.
- Click **Bulk media upload** from the breadcrumb to select different media type to upload.
 - Repeat the above steps.

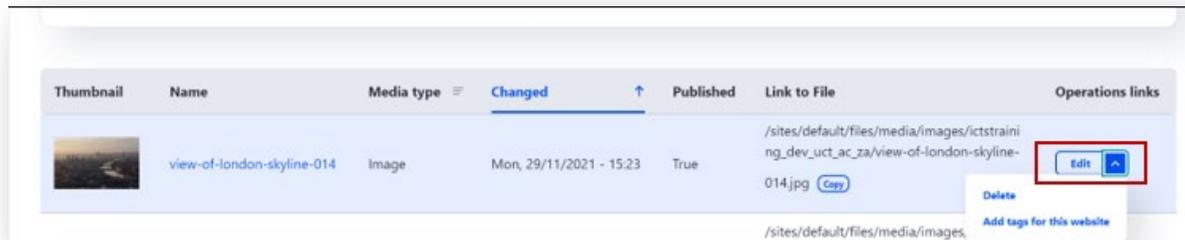


Media bulk upload:

Alternate text cannot be recorded for individual files

Edit media

This option can be used when you want to update/change the previously uploaded file **e.g.** A policy amendment may necessitate that a new policy document is uploaded to replace the previous one. This option also provides a link to the file, which can be copied for reference elsewhere.



3. Navigate back to the Dashboard ensuring that a correct site is selected as **Current site**.
4. Select the **Media** tab
 - Scroll down to individual file, then select **Edit**.
 - Fill the necessary fields then **Save**.

Module 16: Menus

Add a menu

Lesson time: 30 minutes



Lesson Objectives:

In this lesson you will...

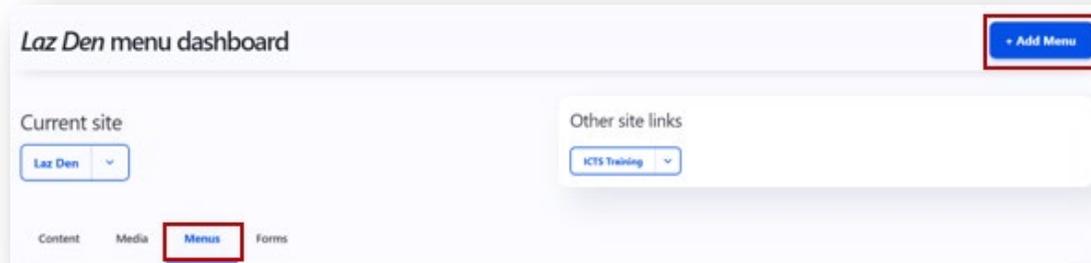
- Create a new menu.
- Assign a menu.
- Add and re-order a menu link.

Introduction

Menus are used to provide access to the website content, menus present an interface through which links to the content are displayed. In UCT Web CMS, every subsite is preloaded with 2 assignable menus, these are the **Footer** menu and the **Main** menu. Additional menus can be created and assigned to either footer or main menu, and only one of each type (main and footer) may be assigned for a subsite. The menu structure is independent from the content, this allows the author to select which content must be linked to the menu. Menu items can be positioned by drag-and-drop to the desired level and position in the navigation structure. Alternatively, a weighting can also be assigned to each menu item to determine where an item will be placed on the menu, e.g. a weighting of -50 places the item at the top of the menu structure while a weight of 50 will add it to the bottom of the menu. A menu item can be disabled, this will make it invisible from the site, however, the content linked to it will not be automatically unpublished because of their independence from each other.

Add menu

1. Log on to the Web CMS Dashboard and select the site you will be updating ensuring it is the **Current site**.
2. Select the **Menus** > **+Add Menu**



- **Title:** This will be visible from the menu overview page. Let it be descriptive of the content it will be displaying.
- **Menu assignment:** Choose the menu to assign this to (footer / main). A link can only be assigned to one, not both, if you attempt to assign to the second menu, the one initially assigned will be unassigned.
- **Administrative summary:** This summary will be visible from the menu overview page.
- **Menu language:** English is the only option available.
- **Assigned domain/subsite:** Select the domain/subsite assignment of this menu.

Add a link

3. On the top right **Click +Add Link**.
 - **Menu link title:** This title will appear on the navigation menu, keep it short.
 - **Link:** begin typing the page title of the node you want to link to, then select from suggestions, alternatively, type the full URL for an external website.
 - **Enabled:** switching this on will make this link visible and accessible.
 - **Description:** this will appear when hovering over this link, it serves as **alternate text**.
 - **Attribute:**

- Target: select how you want this link to open on the browser
 - Download link: select **download** if this link is for downloading e.g. document download.
 - **Parent link:** Select the “**parent link**” under which this link will belong.
 - **Weight:** For a vertical menu, the smaller the value the closer it goes to the top, the larger the value, the lower down it moves. For horizontal menus, the smaller the value, the closer it moves to the left, the larger it is, the farther to the right it moves. If weight is left unchanged at zero, ascending alphabetic order of **menu link title** will take priority.
4. Click **Save** when done.
 5. Navigate back to the **Dashboard**.
 6. Select the **Menus** tab, to go to the **Menu Overview** page.
 - Your newly created menu should appear along with the default menus
 - **Site URL:** this is the **Administrative summary** added during the creation of the menu.
 - **Menu Type:** this indicates where each menu is assigned (Footer/Main).
 - **Operations:** provides options to **edit menu**, **clone menu**, **add a link** to the menu, and **delete** the menu altogether.

Change menu link level

As the menu grows it may have various hierarchical levels whereby a menu link may need to be re-ordered or moved to a different level thus becoming a “child link” of another etc.

1. Navigate to the Dashboard.
2. Select the **Menus** tab, to go to the **Menu Overview** page.
3. Select **Edit menu** next to the menu you want to edit.
4. Scroll down to the **Menu links** section of the **Edit Menu** page.
5. Select **Edit** next to the link you want to reorder.
 - Scroll down to the **Parent link** dropdown.
 - Select the “**parent link**” under which this link will belong.
 - Adjust the weight as desired.
6. Click **Save**.

Module 17: Site settings

Lesson time: 15 minutes



Lesson Objectives:

In this lesson you will...

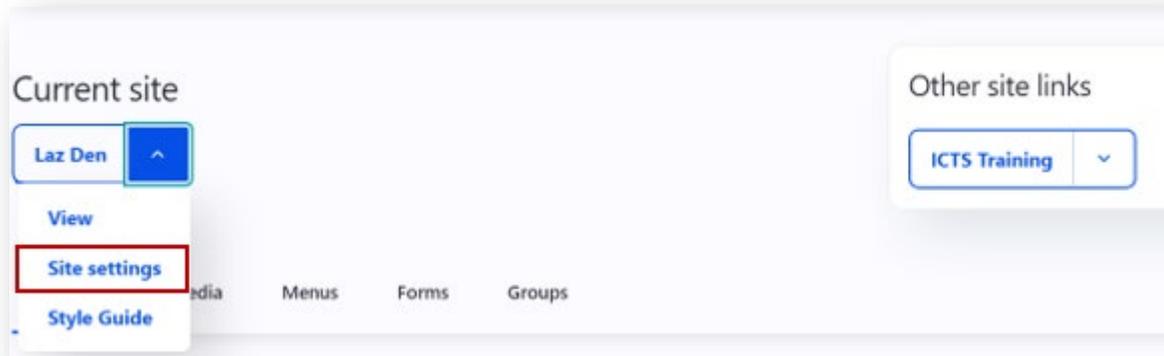
- Apply basic site settings.

Introduction

Menus are used to provide access to the website content, menus present an interface through which links to the content are displayed. In UCT Web CMS, every subsite is preloaded with 2 assignable menus, these are the **Footer** menu and the **Main** menu. Additional menus can be created and assigned to either footer or main menu, and only one of each type (main and footer) may be assigned for a subsite.

Site settings

- Log on to the Web CMS Dashboard and select the site you will be updating ensuring it is the **Current site**.
- Under **Current site**, select **Site settings** from the dropdown next to the site name.



- From the **Basic site settings** tab
 - **Name:** This is the name of your subsite.
 - **Site Domain:** This is the main domain under which this subsite belongs.
 - **Default subsite:** When enabled, this will make the current subsite a default for its domain, only one default subsite may exist for any domain.
 - **Base Folder:** This is only available for non-default subsites. It represents the suffix to the base domain of this subsite and to the home page of this subsite.
 - **Site Description:** This is a summary of this subsite, which may also define its purpose.
- From the **Homepage** tab
 - **Homepage:** Specify the page node which will be the homepage for this subsite, type the title, then select from the suggestions.
 - **Background image:** upload the background image, this must strictly have a dimension of 1920px X 300px, any other dimension will be scaled down.
- From the **Menus** tab
 - Select the global navigation parent menu, if applicable. Select None to not display any global menu.
- From the **Social Media** tab



Default Subsite

You will never need to enable this, it is automatically assigned to and owned by the primary domain.



Header/Background image

- **Strictly 1920px X 300px to fit the site width**
- **Up to 20 MB is permitted**
- **Only .png, .gif, .svg files are permitted**

- Dropdown allows you to select from Facebook, LinkedIn, OrCID, Twitter, YouTube, or any other social media link.
- **Add new social media link (predefined):** specify the URL to each of the social media links available, then click **Create social media link**. Using the predefined list will make use of the relevant social media icons as links.
- **Add new social media link (Custom):** specify the Label first **e.g. Spotify**, then specify the URL to the custom social media link, then click **Create social media link**.
- **Add existing social media link:** this is for social media links which are already created/stored on Web CMS, available for reuse. Start typing in the **Social media link** searchable text field, select from the suggestions then **click Add social media link**.
- From the **Theme** tab
 - **Theme:** Select a theme to apply for the subsite, begin typing on this searchable text field to get suggestion, then select from the suggestions.
 - **Header:**
 - **Override default logo:** enable this to replace the UCT logo.
 - **Enable co-brand:** enable this to upload a co-brand logo from local storage or media library.
 - **Footer:**
 - **Contact information:** populate all contact information here.

Module 18: Theming

Apply and create a theme

Lesson time: duration of lesson in minutes



Lesson Objectives:

In this lesson you will...

- Preview and apply a predefined theme.
- Create and apply a new theme.

Introduction

Themes provide the look and feel for the website. UCT Web CMS has a predefined list of themes, made conveniently available for use by the UCT community. Each website has the flexibility to define its own theme, however, it is important to follow good design principles when creating or changing the theme of the website, for example, do not use dark font on a dark background. Colour scheme should evoke emotion and appreciation for the user. Various content types can have their individual style/theme specified and applied.



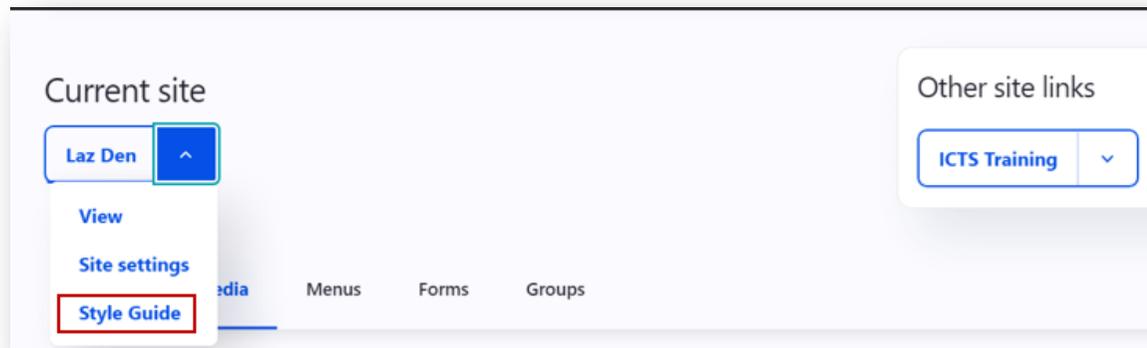
Domain Administrator can clone themes they didn't create, but they cannot edit them.

Preview and apply a theme

UCT Web CMS provides a preview of how various themes will be applied to different content types through the style guide. Style guide uses mock up content instead of live content, to preview themes. Themes have different versions, namely; Draft, Published and Draft revision (this has both a published and draft version). Page content type theme preview includes themes for all possible components that can be added, which makes it the best option for overall theme application. Alternatively, themes can be previewed and applied on an individual content type basis.

Style guide

1. Log on to the Web CMS Dashboard and select the site you will be updating ensuring it is the **Current site**.
2. Under **Current site** dropdown menu, select **Style Guide** from the dropdown next to the site name.



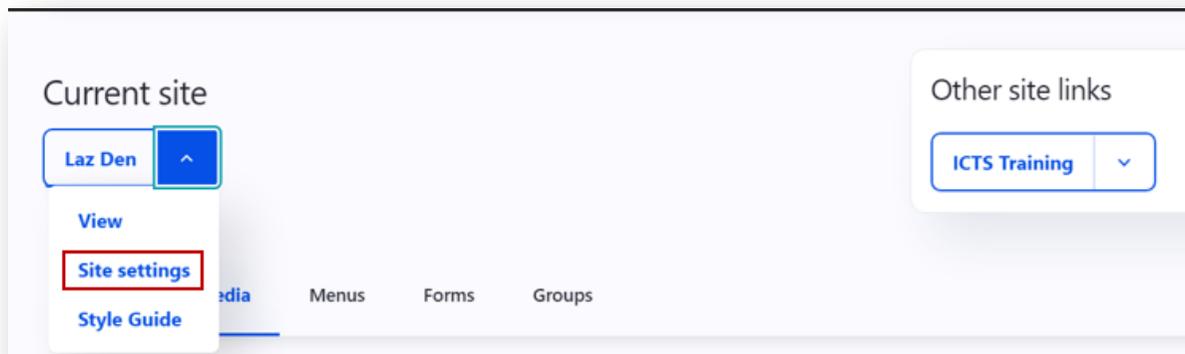
- Click **View** next to the content type to preview/modify.
 - **Apply theme to preview:** Select a theme from the dropdown menu.
 - **Display published version:** if this is enabled it will display the published version of the selected theme, if disabled, only the draft version will be displayed.
 - Click **Apply Theme** to preview the newly applied theme.

Create a theme

If the current themes available from the style guide are not satisfactory, UCT Web CMS offers an option to create a custom theme. Every primary site has a base theme on which themes for subsites can be built and certain features overridden for custom theme e.g. A faculty website has a base theme, and a departmental website uses the base theme to customise its own theme.

Site settings

1. Log on to the Web CMS Dashboard and select the site you will be updating ensuring it is the **Current site**.
2. Under **Current site**, select **Site settings** from the dropdown next to the site name.



- From the **Theme** tab
 - Click **Add/create subsite theme**
 - **Name:** Provide a name for this theme, following the naming convention of SiteName-Description-Version
 - **Base theme:** If there's a preferred theme to build on, specify it here. If this is left blank, the current theme becomes the base theme and may be referenced as such by other subsites.
 - **Save as:** Draft/Published.



- From the **Palette** tab
 - Provide colour values for **background colour, text colour, primary colour, secondary colour, highlight colour and link colour.**
- **Optional:** From the **Template** tab: Section templates are created separately from the theme, they are applied here.
 - **Header template:** type and select a pre-configured template.
 - **Footer template:** type and select a pre-configured template.
- **Additional libraries:**
 - **Library:** presents a list of scripts that have been pre-loaded for use, these libraries perform a variety of automated tasks.
 - **Add custom css/js library:** allows for addition of css and JavaScript libraries.
- Click **Save**.
- Preview the theme form **Style guide**.



Security Restriction:

Libraries are created by the Platform Administrator role only.

Advanced Theming: Section templates (optional feature)

Create section templates

Navigate to **Site settings > Theme** tab

- Click **Subsite theme list**.
- Click **+Add Section templates**.
- Select **Footer**
 - **Name:** Provide name for this footer section
 - **Quicklinks:**
 - **URL:** provide link here.
 - **Link text:** Provide text to click through to the URL.
 - Provide colour values for **primary colour, secondary colour, highlight colour, text colour (body background colour), footer background colour (text colour), and link colour.**
- Click **Save**.



Templates will be added for use in due course

- Click **+Add Section templates** to create a header section
- Select **Header**
 - **Name:** Provide name for this header section
 - Provide colour values for **Text colour (main body background colour), text colour, link colour, header background (primary colour), secondary colour, and highlight colour.**
- Click **Save.**

Apply the theme

- Navigate to **Site settings**
 - From the Theme tab
 - **Theme:** type and select the theme from the options.
- Click **Save.**

Module 19: Webforms

Create a webform

Lesson time: 30 minutes



Lesson Objectives:

In this lesson you will...

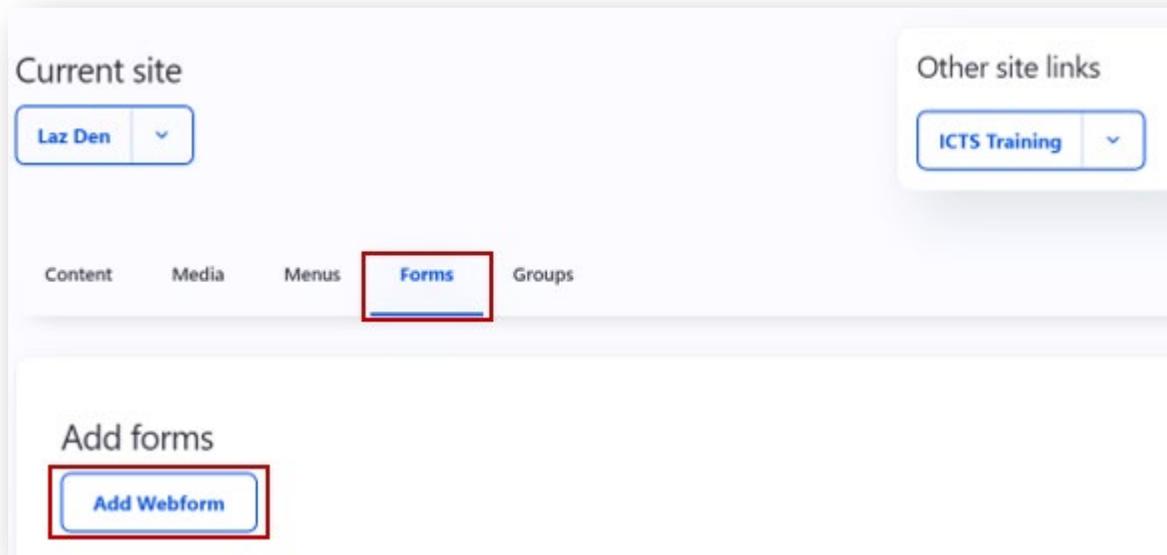
- Create a webform.
- Assign an email address to a webform.
- Restrict access to information.
- Configure download options for results.

Introduction

Webforms are used to collect user data, they can be used to collect feedback for service rendered, to register for an event or collect data for research purposes etc. It has a built-in anti-spam/bot protection which protects against spam submissions. A webform is made of various elements that are used to capture the data provided by the user. The elements are categorized as **Basic elements**, **Advanced elements**, **Composite elements**, **File attachment elements**, **File upload elements**, **Markup elements**, **Options elements**, **Computed elements**, **Containers**, **Date/Time elements**, **Entity reference elements** and **Buttons**. A webform offers many elements, to keep to scope, this guide will only cover some very basic elements.

Webforms

1. Log on to the Web CMS Dashboard and select the site you will be updating ensuring it is the **Current site**.
2. Select the **Forms** tab, then click **Add Webform**.



- **Title:** Specify the title of the webform.
 - **Administrative description:** provide a brief description of this webform
 - **Category:** Select from the list, or specify a new category by first selecting **Other** from the options.
 - **Open/Closed:** This indicates whether the form is accessible or not.
 - **Click Save.**
3. From the Build tab of the webform
 - Select **+Add element** from the top right.
 - From the **Select an element** pop-up window, you can do the following:
 - **Filter by element name:** this allows for reduced display of elements.
 - **Show/Hide preview:** this shows a preview of each element next to its name, or hides it.

4. The following walk-through will demonstrate an event/meeting registration form.
- From the **Composite elements** group, select **Add element** for **Contact**.
 - **Title:** This is a descriptive label which is displayed for this element.
 - **Limited:** This dropdown is for specifying how many of this element will be available to fill.
 - **Contact settings:**
 - **Visible:** when disabled, the individual component will be hidden from the user.
 - **Labels:** this comprises a label describing each component.
 - **Settings:** for most components, this allows for setting whether a field is required or optional. Enable it for fields that cannot be left blank. For other components it provides different options, to be addressed individually later.
 - **General field values**
 - **Enter placeholder...:** this is a placeholder to provide an example to the user, e.g. for a name you can use a text such as “*e.g. John*”.
 - **Enter help text...:** this is a tooltip which appears when mouse hovers over the component.
 - **Enter description...:** this is a description of what the field represents.
 - **Select title display:** specify where to display the label of this component.
 - **Use Flexbox:** This option can be used to change the layout of certain webform elements, it also allows for grouping of elements.
 - **Select2:** This options provides a filterable text field when enabled **e.g.** when you select a country from a dropdown list, there will be a text field where if you begin typing “S” all countries that begin with “S” will be displayed.
 - **Element description/help/more:**
 - **Description:** This field can be used to provide a short description of this element which is displayed as help to the user when using this element.
 - More: Shows a read more show/hide widget below the description
 - a. **More title:** this is a clickable used to open/close more text.
 - b. **More text:** A long description of the element that provides additional information relating to this form.
 - **Form display:**

- **Title display:** Determines the placement of the title.
- **Description display:** Determines the placement of the description.
- **Help display:** Determines the placement of the help tooltip.
- **Field prefix:** This would apply to an individual field which might have a constant e.g. currency values might be prefixed with “R” for rands.
- **Field suffix:** This would apply to an individual field which might have a constant e.g. weight values might be suffixed with “kg” for kilograms.
- **Disabled:** When enabled this will make the entire field uneditable.
- **Prepopulate:** When enabled, this element will be populated with test data.
- **Form validation:** When enabled, it shows a “required” indicator for all the required fields in this element

At this stage a webform with a person’s name and contact details has been created, next steps will cover the creation of an attachment, which will be sent to the person who sends their RSVP by submitting the form. This attachment is a meeting invitation file such as an ics file for windows or iCal for mac. The file has to be uploaded into the media gallery via the dashboard.

- While on the build tab of the webform:
 - Select **+Add elements**.
 - Add **Attachment URL** element from the **File attachment elements** group.
 - **Title:** This is a descriptive label which is displayed for this element.
 - **Display on:** In this instance, this will only be sent to anyone who fills and submits the form, it does not have to be displayed.
 - **File name:** the name of the meeting/event file with the file extension *e.g. training.ics*.
 - **Link title:** This is displayed if/when the attachment is displayed.
 - **URL/path:** This is a path to the calendar/meeting file, access and copy it from the media gallery.
 - **Remove whitespace around the attachment's content:** Enable/Disable.
 - **Sanitise file name:** If enabled this will change all special characters to hyphens, transliterate and lower case the file name.
 - **Force users to download:** Enable/Disable.

- **Form display:**
 - **Title display:** Determines the placement of the title.

Email handling

When a form has been filled and submitted, it has to be sent to a mailbox where further processing and related activities can be carried out. The next steps will cover setting up of related email/handlers. A handler runs a specific task when an action has been triggered. In the next step we will be setting up an email handler.

- Select **Settings** for the relevant form.
- Select **Emails / Handlers**
 - Select **+Add email**
 - **Administrative notes:** This will be displayed on the administrative page for handlers.
 - **To email:** Where the form submission will be sent for further processing, select **Custom To email address** then type it in the text field below. Repeat this if CC and BCC email addresses are needed.
 - **From email and name:**
 - a. **Default:** Web CMS generated.
 - b. **Elements:** It reads the form submission and submits details provided.
 - **Reply to email:**
 - a. **Default:** If there's a shared mailbox for the website, it can be used here.
 - **Subject:**
 - **Body:**
 - **Included email values/markup:**
 - **Always include elements with private and restricted access:** Enable/Disable.
 - **Exclude empty elements:** Enable/Disable.
 - **Exclude unselected checkboxes:** Enable/Disable.
 - **Attachments:**
 - **Include files as attachments:** In this instance, it is important to enable this, because there's an attachment (the calendar file).
- Click **Save**.

After a form is submitted, the user will be redirected to the confirmation page, this confirmation page and its behaviour can be set from the setting tab; by following the steps below.

- Select **Build** next to the relevant form
- Select the **Settings** tab below the webform title.
- Select **Confirmation**
 - **Confirmation type:**
 - **Page:** redirects to new page and displays the confirmation message.
 - **Inline:** reloads the current page and replaces the webform with the confirmation message.
 - **Message:** reloads the current page/form and displays the confirmation message at the top of the page.
 - **Modal:** reloads the current page/form and displays the confirmation message in a modal dialog.
 - **URL:** redirects to a custom path or URL.
 - **URL with message:** redirects to a custom path or URL and displays the confirmation message at the top of the page.
 - **None:** reloads the current page and does not display a confirmation message.
 - Confirmation settings
 - Confirmation message: this will display on the confirmation page except the **URL** and **None** options.
- Click **Save**.

Access

Another important aspect to accessing and processing of personal information is legislation and ensuring that everyone is compliant. The access tab of the webform offers various ways to manage form data including restricting access to this information to only authorised personnel, however, the creator/author of the webform will always have access to the form and any form submission data.

- Select the **Settings** next to the relevant form.
- Select **Access** tab
 - **Create submission:** Specify which users may fill and submit this form
 - Expand the **View any submissions** group:
 - Select any Web CMS role from the list, if applicable, alternatively type the details of the authorised personnel in the searchable **Users** textfield below then select from the suggestions.
 - Expand any other group, similarly as above, select the required option if applicable.

Results

Efficient processing and presentation of the collected data will be possible when the data is downloaded from Web CMS and into an application like Excel.

- Select **Results** next to the relevant form.
- **Submission tab:** Shows a “web view” of the webform submissions.
- Select **Downloads** tab: allows for configuration of an output file.
 - **Export format:** Select the output file from the options.
 - **Delimiter text format:** Select the separator from the options.
 - **Generate Excel compatible file:** Enable this if Excel will be used for analysis or presentation of the results.
 - **Element multiple values delimiter:** Select a different separator from the options listed, this applies to elements with multiple values.
 - **Header options:** Select what the output file should display on the header.
 - **Composite elements:** Select option to display for composite element items.
 - **Column options:** Select which columns to display.

- **Download options:** Select preferred options from the list.
- **Save settings**
- **Download:** download results to preferred location.

