Editing the Stanhoe website

Welcome to the stanhoe.org editing guide, 2018-11-23 version

Welcome to the latest draft of the stanhoe.org editing guide. This is always available for download from the website at:

http://stanhoe.org/uploads/docs/help/stanhoe-website-admin-guide.pdf

New in this version:

- "A note about screenshots"
- Other small tweaks and updates

Charles Butcher

A note about screenshots

This document has developed piecemeal over several years, and as of November 2018 many of the screenshots still show the previous version of CMSMS (version 1) rather than the current version 2.

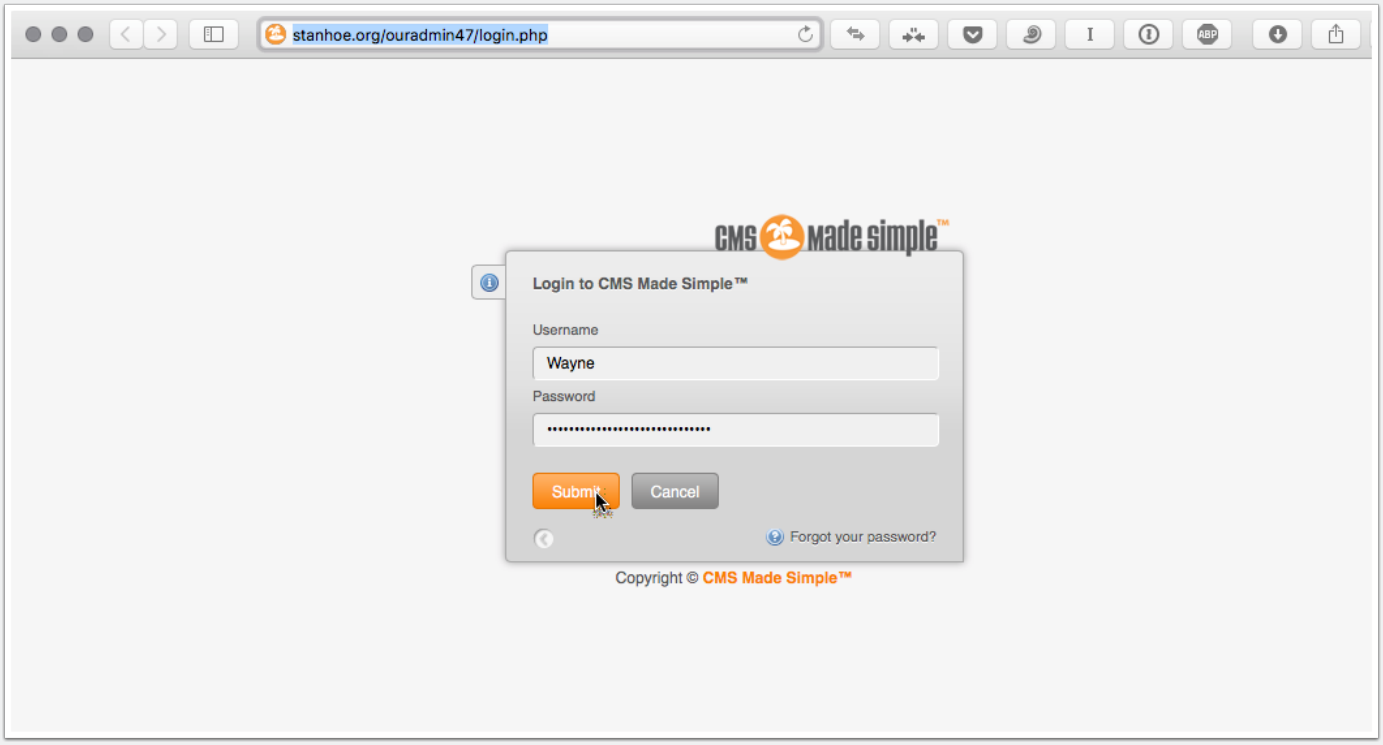
In practice there is not a lot of difference between the appearance of the two CMSMS versions. Some things may look a little different, but you should be able to find the commands you need. If you do have trouble, please tell the webmaster.

Log in to the website

To start working on the website, you need to log in to the section reserved for administrators. This is sometimes called the "back end" of the site (the "front end" is what visitors see).

- Go to https://stanhoe.org/admin/login.php
- If you haven't yet done so, bookmark this page for future reference
- Fill in your user name and password
- Click "Submit"

stanhoe.org runs on a content management system (CMS) called CMS Made Simple ("CMSMS"). You can Google "CMSMS" to find useful resources on the web.



News items list

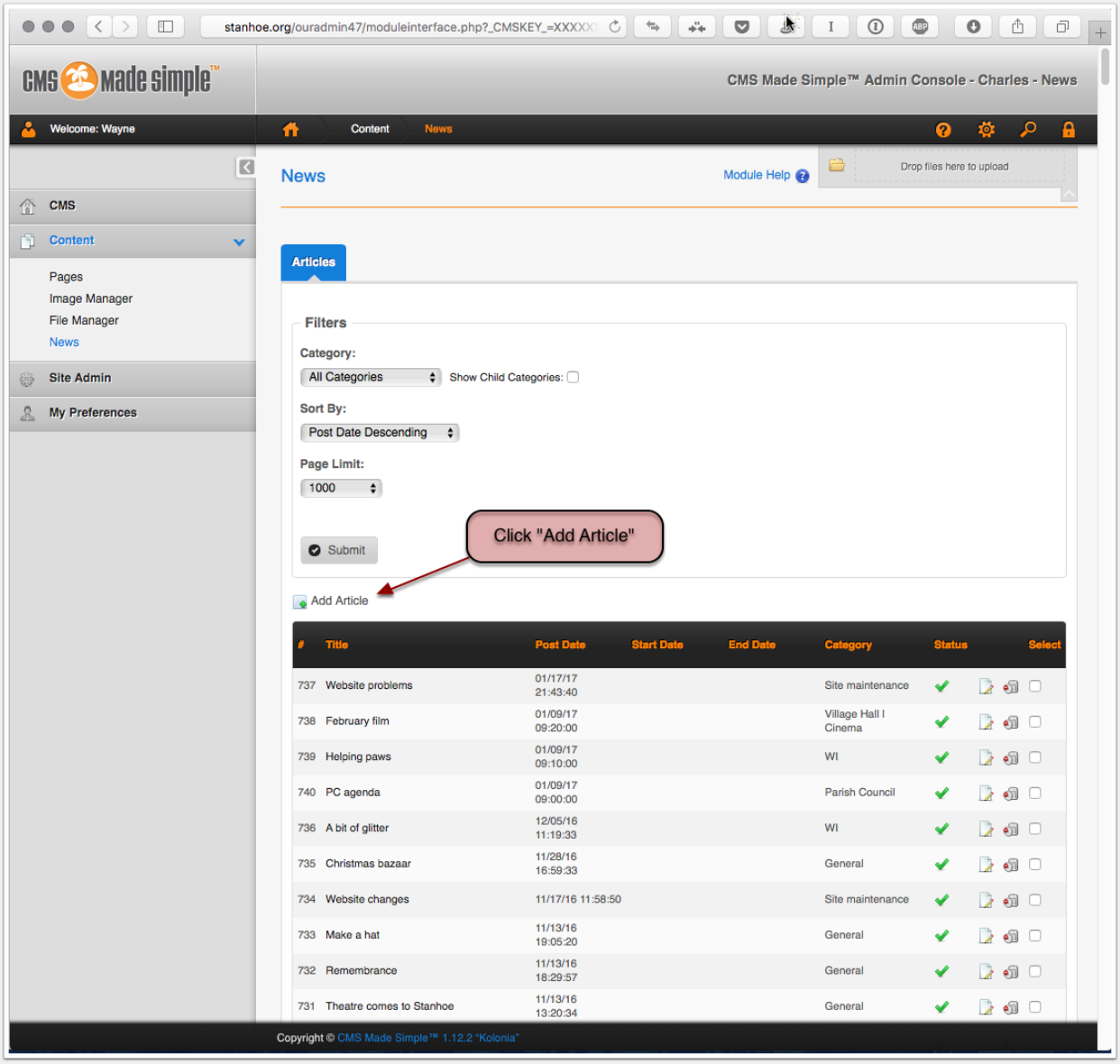
You'll end up looking at a list of News items (though you can customise this behaviour later).

News items are the stories that show up in the sidebar at the lower left-hand side of each page on the website. Use them for stuff that you want to bring to people's attention. News items are archived for ever (though you can change this), but only the most recent few are easy to see.

The list shows the title of each news item, when it was posted, its category – such as WI or Parish Council – if applicable, and other information.

To edit an existing News item, click on its title.

To create a new News item, click on "Add Article".



Create a News item

Clicking "Add Article" in the news item list brings up a new screen where you can fill in the information needed to create a new News item.

Every News item needs a Title, a Summary and a main story (the "Content"). It may optionally have a Category.

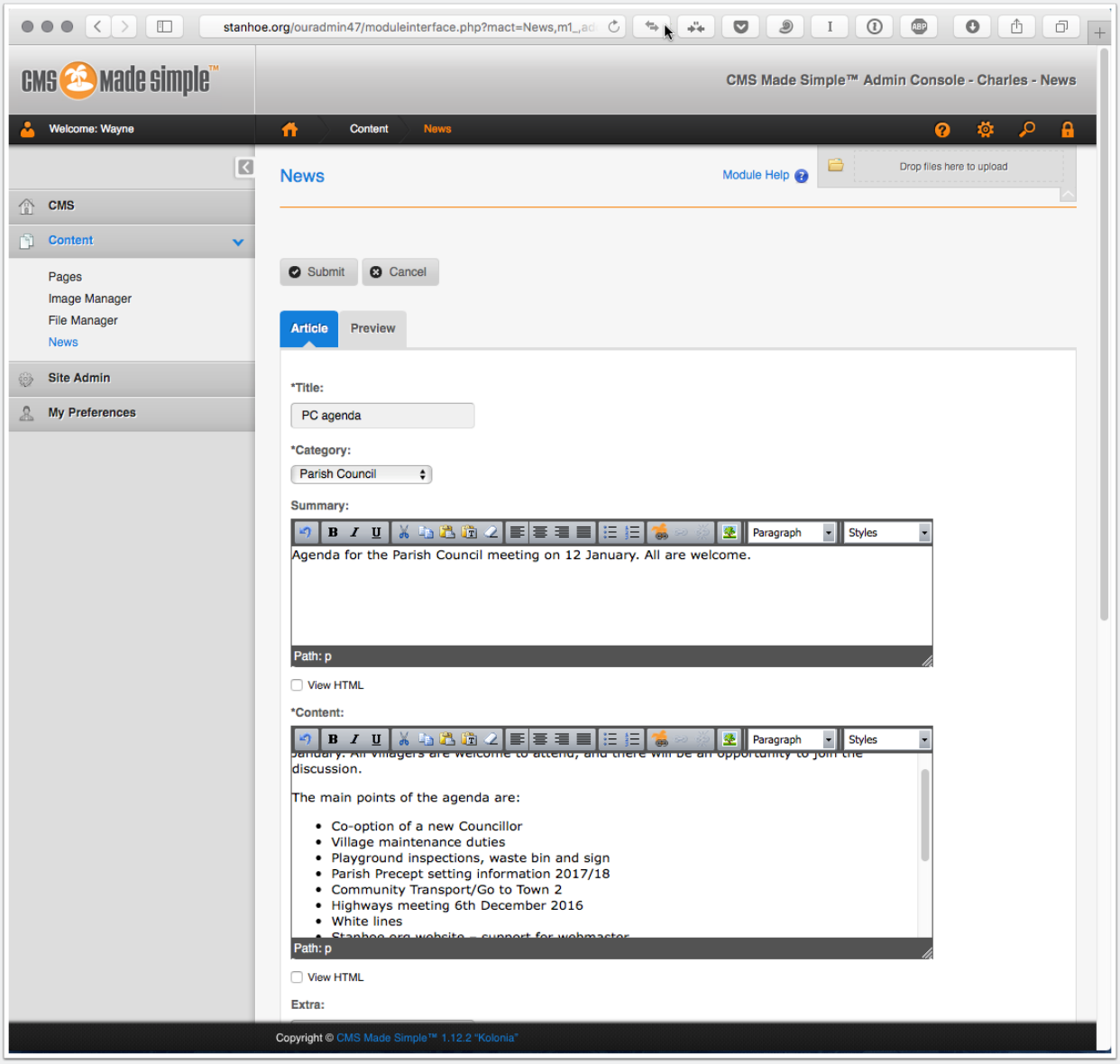
The Title should generally be no more than a couple of words, because it needs to fit on a single short line in the News sidebar. The News item list page will give you an idea of suitable Titles. For repeating items such as Parish Council agendas there's no harm in recyling a previous Title.

Categories are important for activities such as the cinema, the WI and the Parish Council because they control where news items are displayed. The WI page, for instance, always displays the top half-dozen News items with the Category "WI". Check the list of Categories, and if you find one that fits, use it. If there's no specific Category, use "General".

The Summary also needs to be short – between 8 and 14 words, say – because it needs to fit on one, two or at most three short lines. Try to include the most important information, such as dates. Don't use any formatting such as bold.

The main Content can be as long as you like. Use the buttons at the top of the text box to add styles, bullet lists, links and images (more about all of these below). Do not directly paste in text from a web page or Microsoft Word; instead use the "Paste Plain Text" button or copy it via a text editor that does not support styled text. More about this below.

On no account try to paste in images. There are special procedures for dealing with these. More about this below.



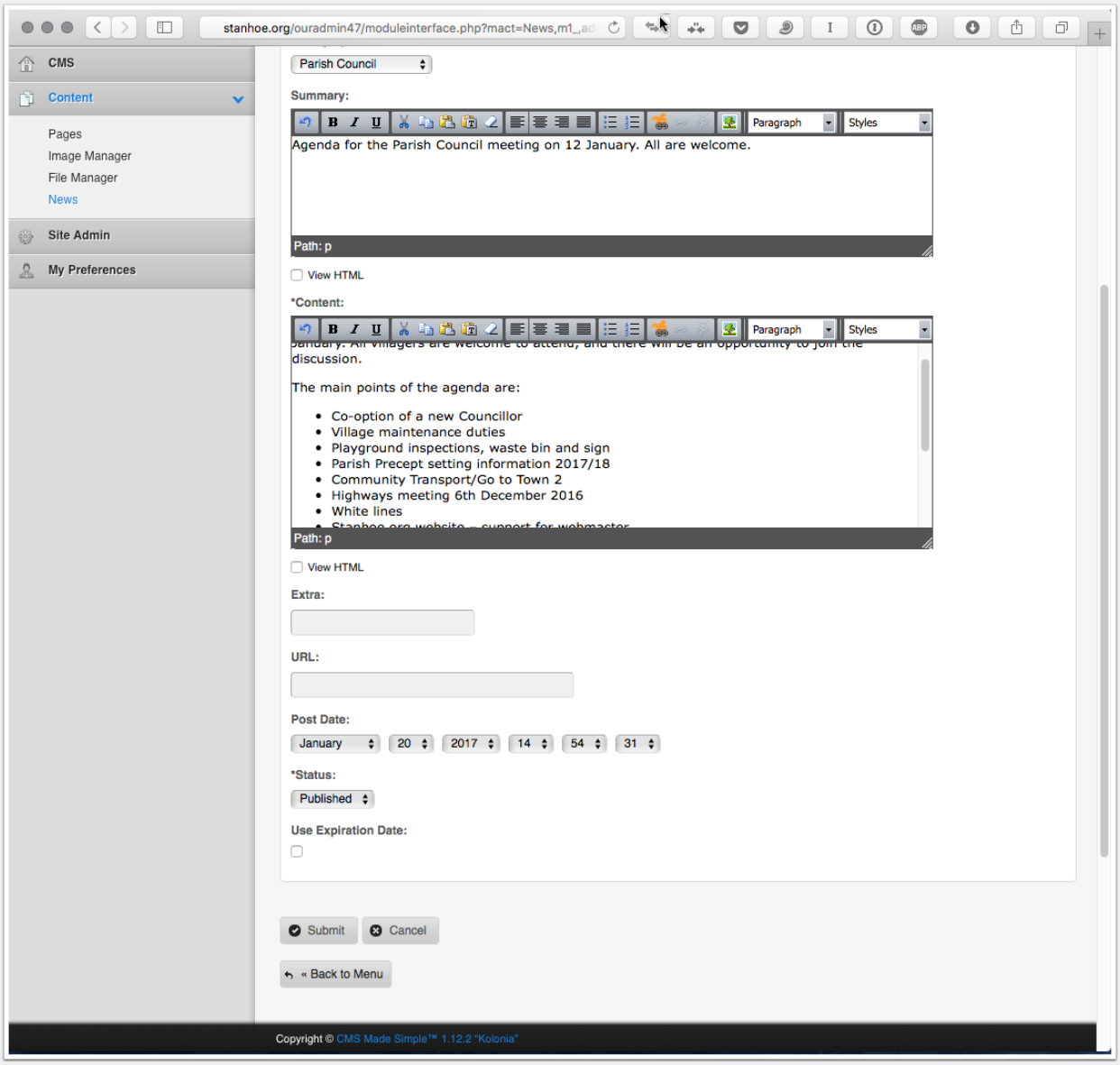
Publish your News item

Once you are happy with the Title, Category, Summary and Content of your News item, click the Submit button at the bottom. After a pause you will see a message confirming

that the operation was successful, and you will be returned to the News item list. Your new News item will show at the top of the list.

On rare occasions you may not want a News item to appear immediately. In this case, before you click "Submit", set the "Post Date:" dropdowns to the date and time you want your item to appear.

Similarly, you may want some News items to expire automatically at a preset time, rather than having to remember to delete them manually. In this case check the "Use Expiration Date:" checkbox and use the resulting dropdowns to set the date you want the item to disappear from the website.

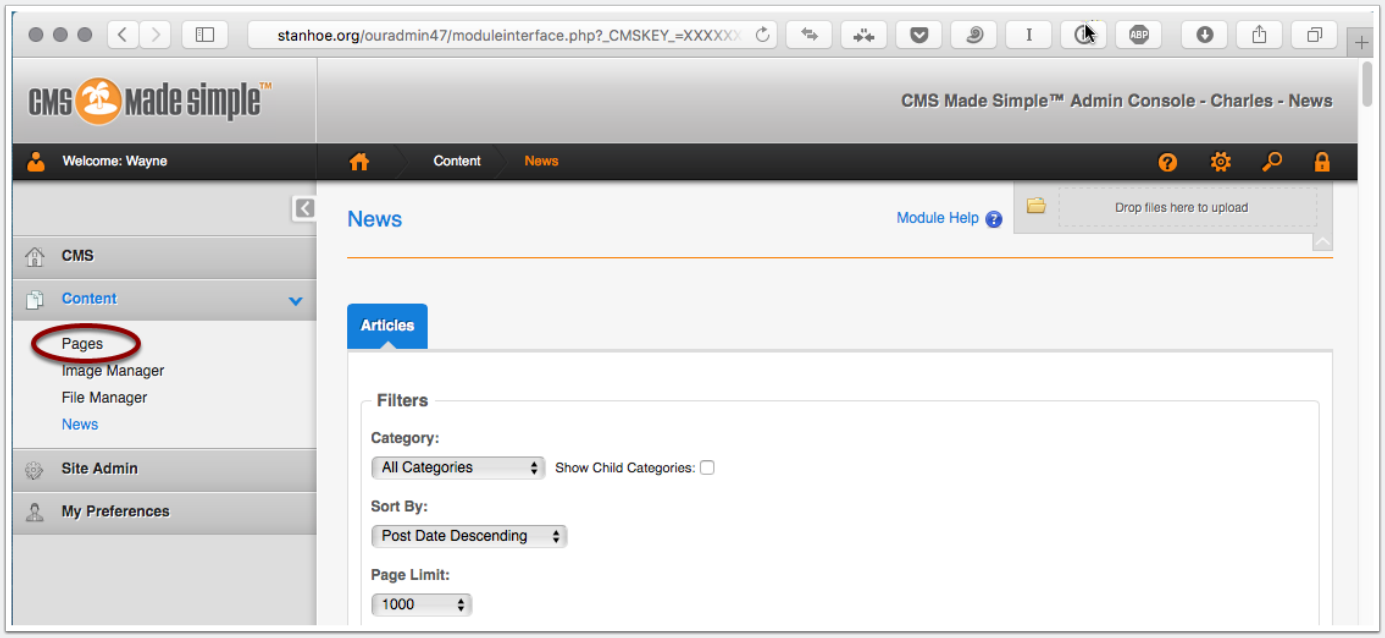


View Current Pages (1)

Pages are the main content of the website – the wider central part between the two sidebars on the left and right.

Adding or editing a page is similar to working on a News item, with some extra knowledge needed to make sure a new page shows up in the correct position on the site.

Start by clicking on the Content > Pages link from anywhere in the admin part of the site:



View Current Pages (2)

The "Current Pages" screen is a hierarchical list of all the pages on the site.

Click the blue "flippy triangles" to show or hide sub-pages (and sub-sub pages) at each level. Use the "Expand All Sections" and Collapse All Sections" as necessary.

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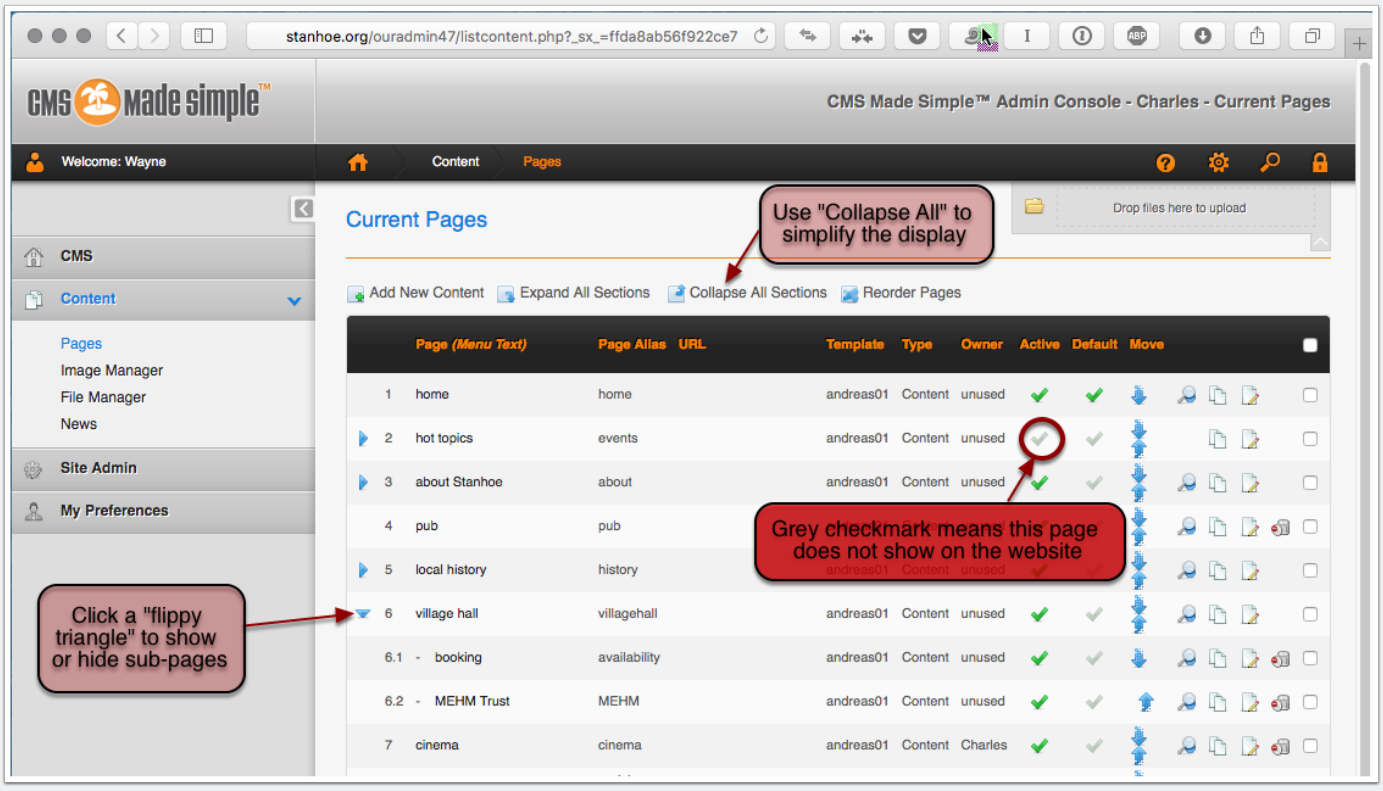
Each page has a name that appears on the menu that visitors use to navigate the site (see below). These names don't have to be unique, so for example in the section for Saints Alive you might have a page named "February" in each year.

Each page also has an "Alias" that's used to create the web address (URL) of that page, for instance "http://stanhoe.org/villagehall". Aliases must be unique, so for our Saints Alive example we might have "2017-February", "2016-February" and so on.

Not all the pages that currently exist on the site are accessible to visitors. Notice that the "hot topics" section has a grey checkmark in the "Active" column, showing that this page and its sub-pages have been archived for the moment.



Compare Page names and positions with how they appear on the main navigation menu

Look at stanhoe.org – the "front end" of the site – and notice how the order and name of each page in "Current Pages" correspond to its name and position in the navigation menu.

The "Village hall", "Village hall > booking" and "Village hall > MEHM Trust" links in the main menu match the Page positions on the screen above.

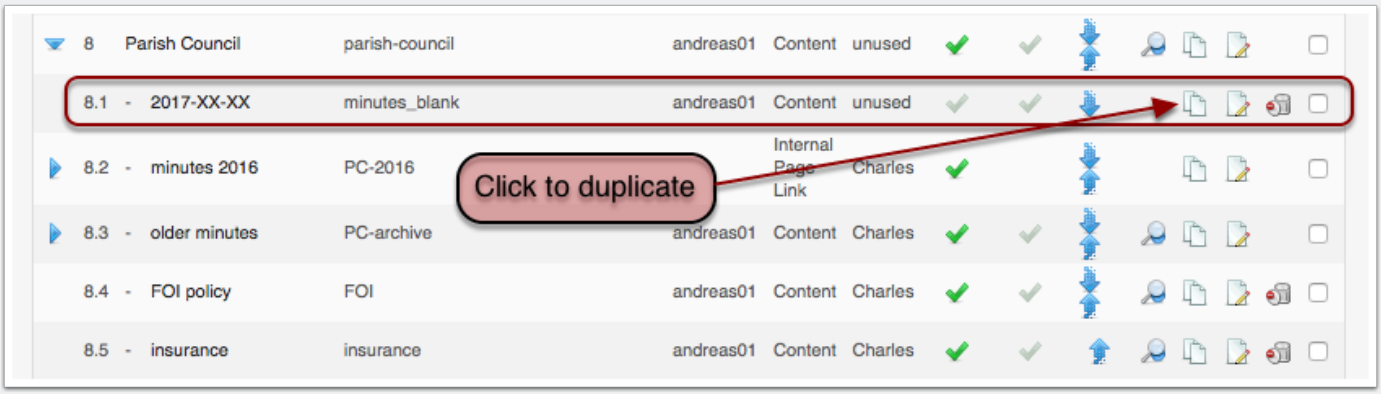
Make a new page from an existing template

The ability to hide pages from visitors means we can create templates for common items such as Parish Council minutes or issues of Saints Alive. Let's create a new page of Parish Council minutes.

On the Current Pages screen, click the flippy triangle to open the Parish Council section.

Notice the page named "2017-XX-XX". This is a template for Parish Council minutes. The grey checkmark in the "Active" column shows that it isn't visible from the front end of the website.

Click the "two pages" icon to make a duplicate of page "2017-XX-XX".



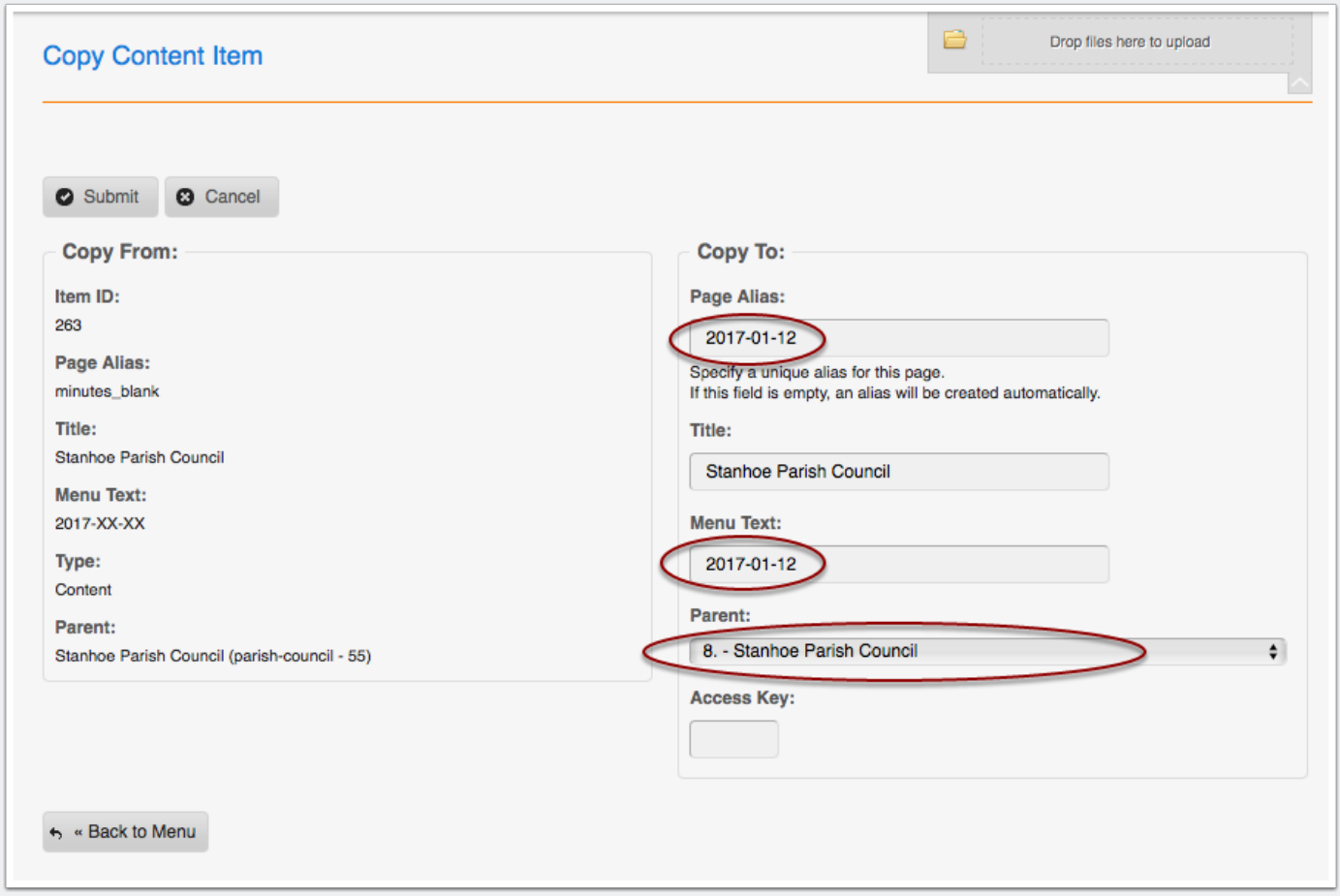
Duplicate a page

After a few seconds you will see the "Copy Content Item" screen. Here you need to fill in the name, alias and title of the page, and specify where it should go in the navigation menu.

We are going to make a page for the meeting minutes from 12 January 2017. For Parish Council minutes we use a date of the form "2016-11-10" for both the menu name and the alias, so fill in the date of the meeting in the appropriate fields.

The title of the page is pre-filled as "Stanhoe Parish Council". You'll see this at the top of any page of Parish Council minutes.

The trickiest part of this screen is the dropdown menu labelled "Parent:" This controls where the new page will appear in the hierarchical page menu. See the next step for how to set this.



Setting the parent page

Clicking the "Parent:" dropdown reveals a huge number of pages, most of which have the title "Stanhoe Parish Council". So which one do we choose as the parent of our new page?

Each page in the hierarchy has a unique number. The first Parish Council page in the list (number 8) is the main Parish Council page (http://stanhoe.org/parish-council). Page 8.1 is the template page we are currently duplicating.

Page 8.2 has the title "Stanhoe Parish Council minutes 2017", and it's at this level that we want our new page to go, so choose this from the dropdown.

On to the next step…

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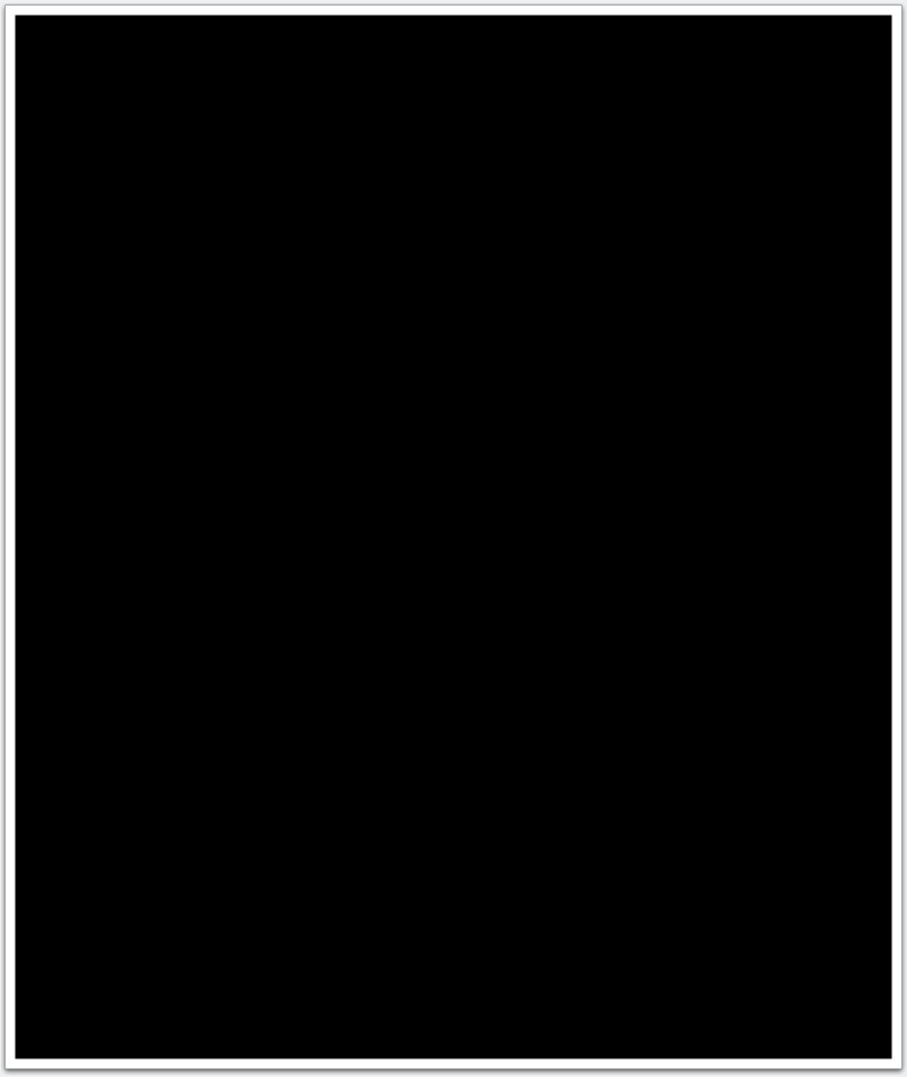
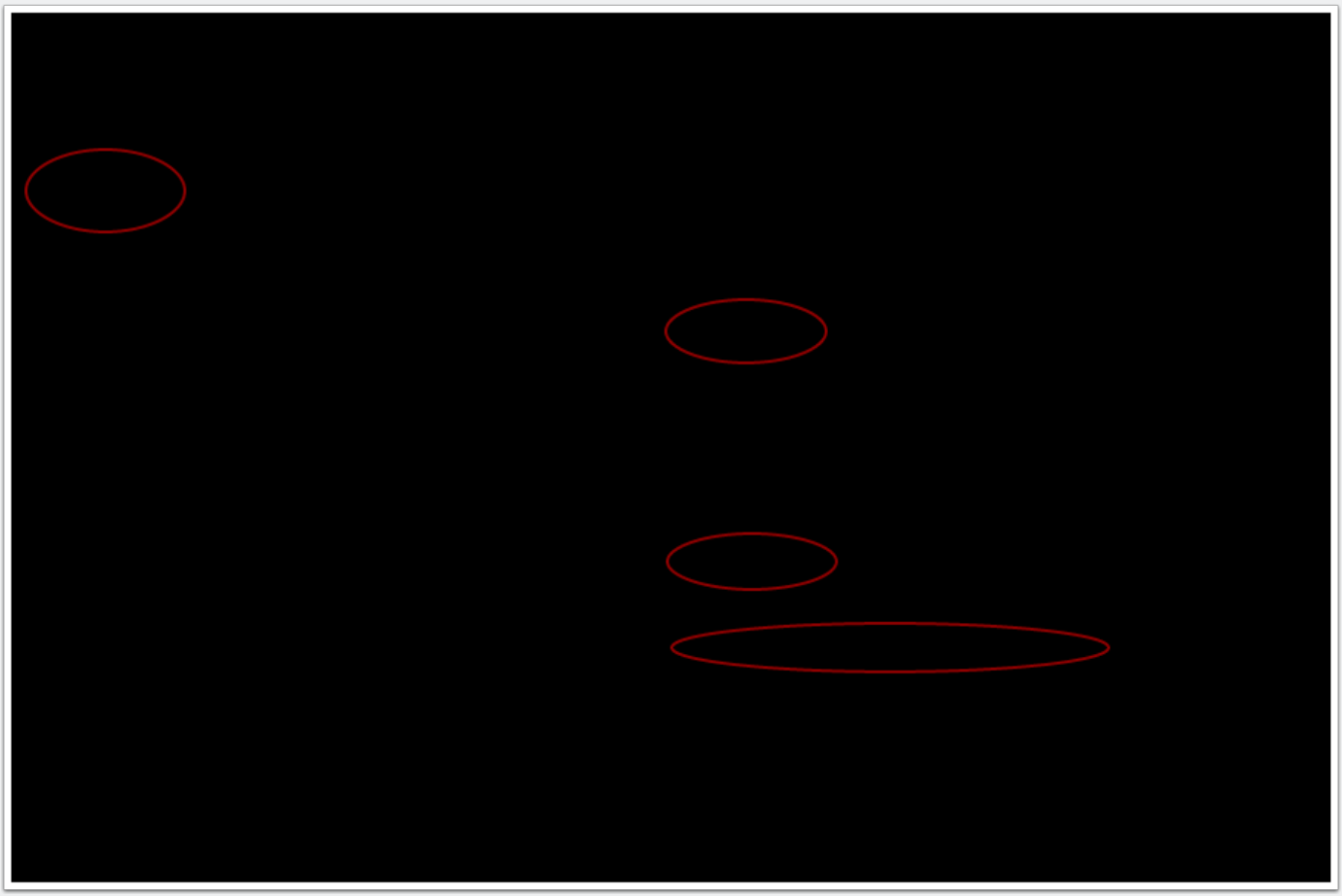


Ready to duplicate…

With the alias, title, menu name and parent of the new page set, we're good to go. Click the "Submit" button to create the new page.



Here's our new page

After a few seconds you will be returned to the Current Pages screen, this time showing our new "2017-01-12" page. You might have to click the flippy triangle to the left of "minutes 2017" to reveal the new page.

Note that the "Active" checkmark for the new page is grey, so it isn't yet visible from the front end of the site. When the time comes, we'll click on the checkmark to make the page active. Before that, however, we have to add some content to the page.

To edit our new page, click on its name.

Edit page content

The "Edit Content" screen allows you to edit the text on any page.

You can also edit the Title, Menu Text and Parent fields. Since we've just duplicated an existing page, these fields are already filled in. If we had created a new page from scratch, however, we would need to fill them in now.

This screen has three tabs: "Main", "Options", and "Preview". You will spend most of your time in "Main". You shouldn't normally need to touch "Options". "Preview" can be useful for showing you how the page will look, but it doesn't always work properly.

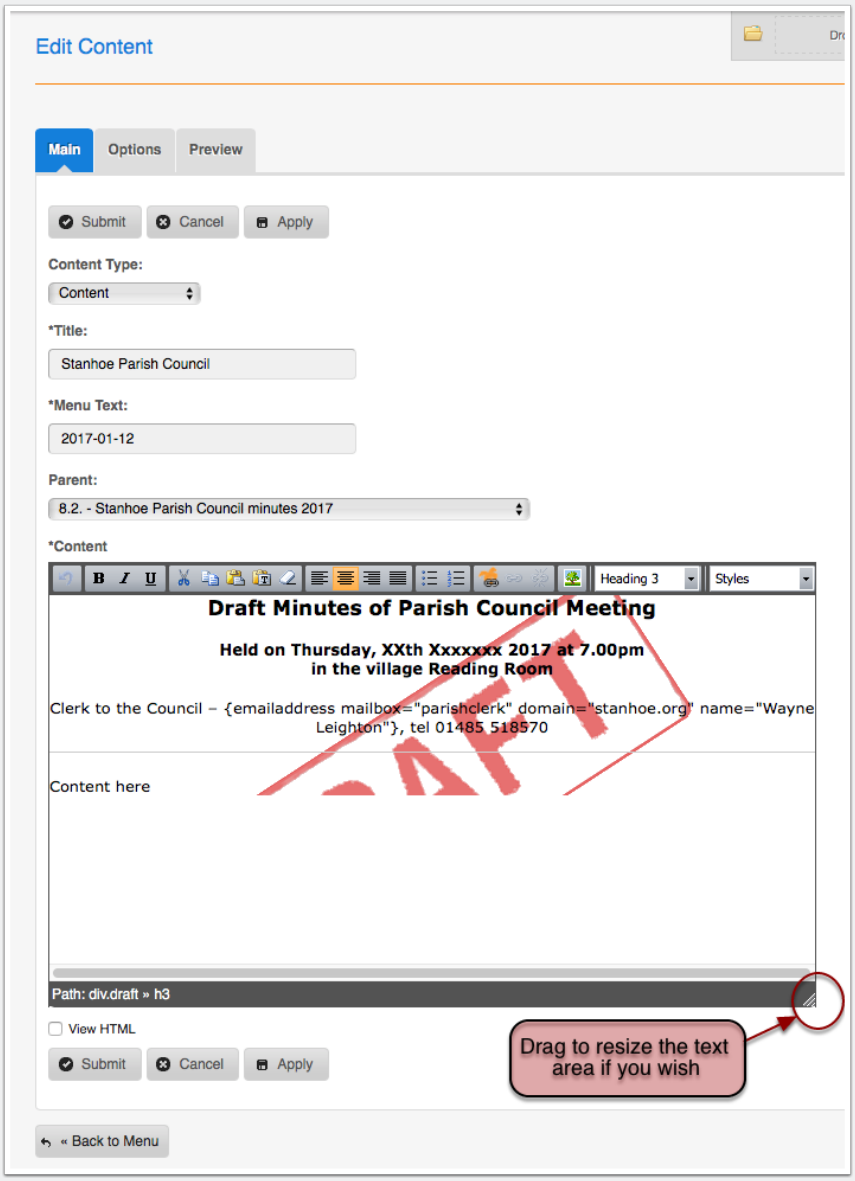
The "Content Type:" dropdown should normally be left as "Content".

Type the text for the new page into the main text input area. In this case the header at the top of the page is already in place, so we only need to type in the date and, if necessary, change the day name and meeting time.

Notice that Wayne's name and email address is formatted in a special way to stop robots from harvesting email addresses from the site. More about this below.

The bulk of the text should replace the words "Content here". See the next step for how to paste in text from a word processor.

The "DRAFT" stamp is specific to Parish Council minutes, so you won't see this on other page types.



Paste in text from a word processor

The text input area has a toolbar that looks a bit like the one in a word processor such as Microsoft Word. Don't be fooled, though. This is a website, not a word processor,

and different rules apply. For instance, you make a heading by applying a "style" such as "Heading 1", not by making the font big and bold.

Most importantly, **do not paste text straight in from your word processor**. It might look OK on the screen, but behind the scenes it will be a mess and website visitors may see unpredictable results. Instead, follow the procedure below.

Here we've typed in the correct date for the Parish Council meeting, and we are ready to paste in the main text to replace the words "Content here". So:

- **Click the "Paste text only" button** in the toolbar and check that it stays highlighted.
- In your word processor, copy the appropriate part of the minutes.
- Return to the text input area and select the words "Content here".
- Use your computer's standard "paste" command (CTRL-V in Windows, cmd-V on a Mac) to paste the text. You can also try the "Paste" button to the left of the "Paste text only" button, but this doesn't work for all browsers.

Note that "Paste text only" *isn't a paste command as such*. It's a switch that, when enabled, stops the standard paste command from inserting all the garbage that's hidden within text copied from MS Word.

See the next step for the results.

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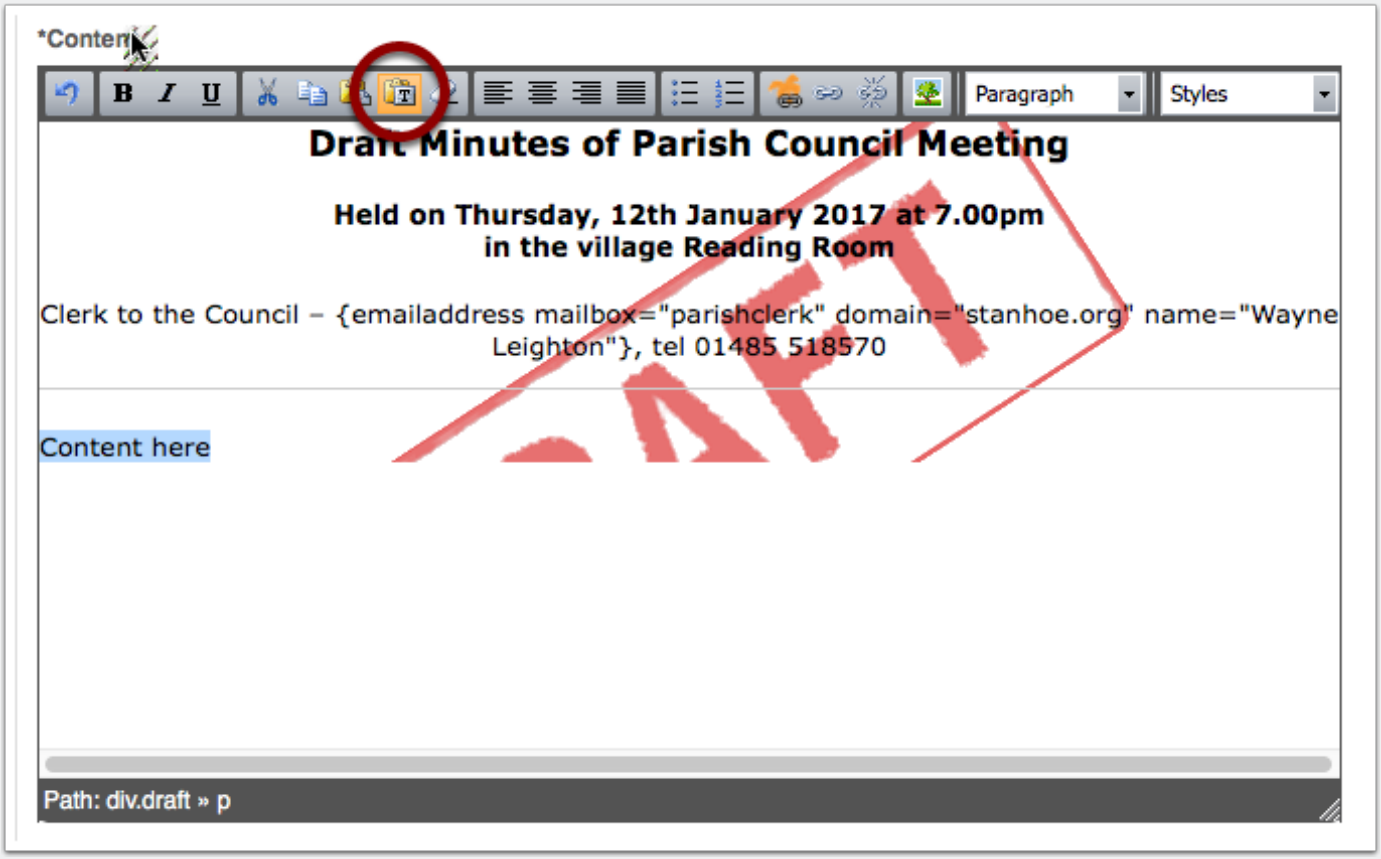
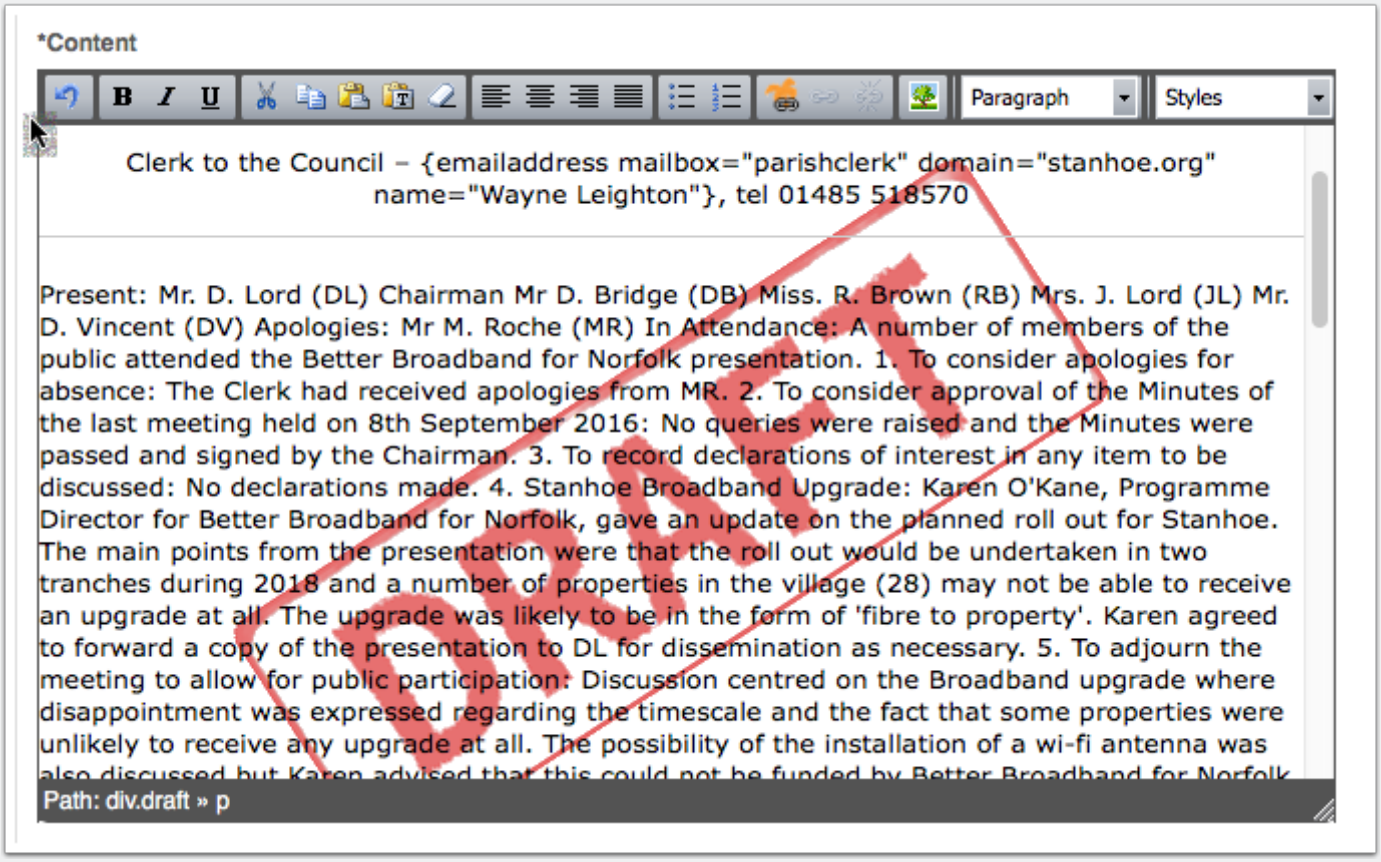


Clean up pasted text (1)

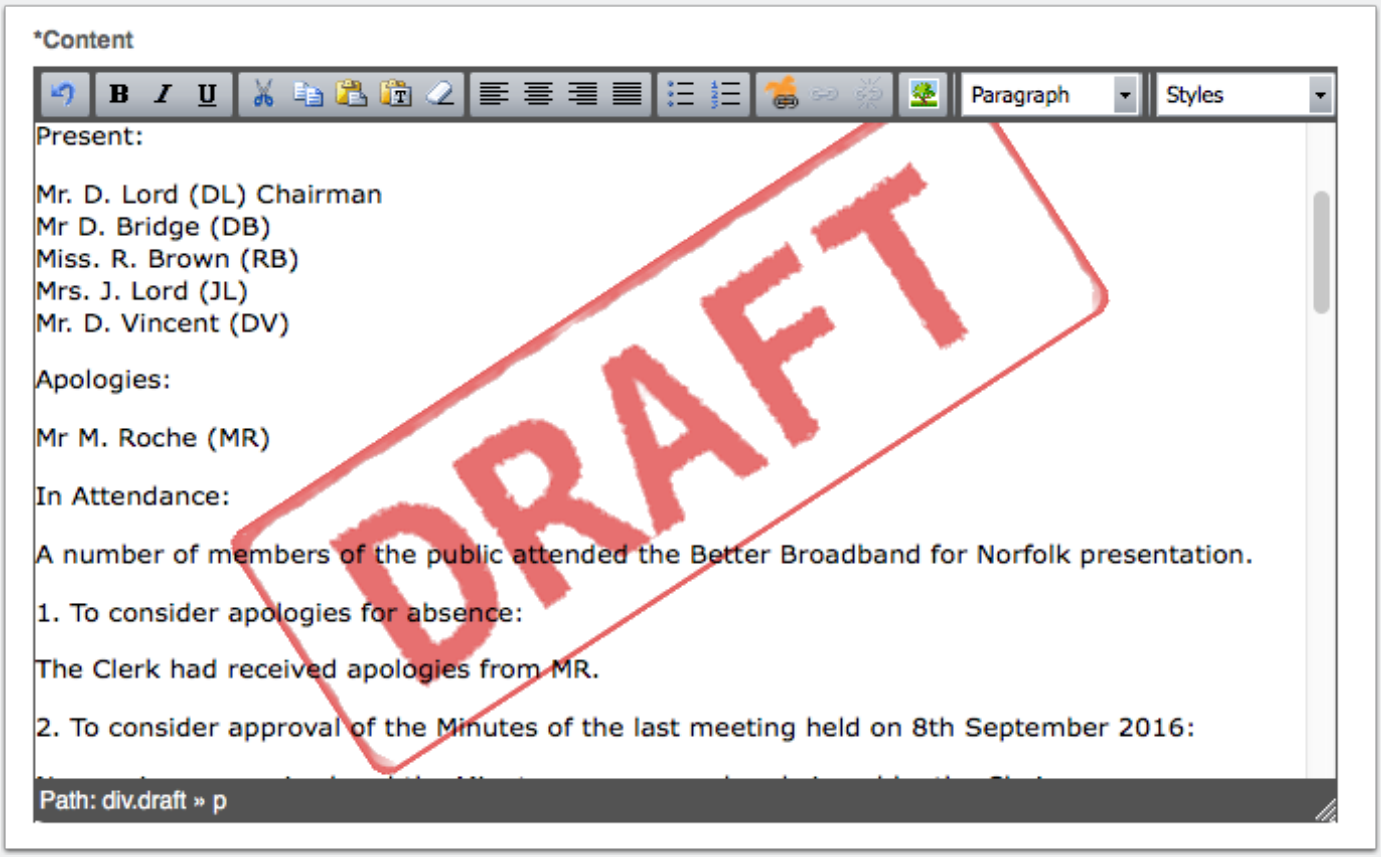
The result of our paste operation is one long paragraph – not pretty. Now we need to format this properly.



Clean up pasted text (2)

Start by breaking the text up into paragraphs. As with a word processor, place your cursor where you want the line to break and press the Return key. The lines will space automatically, so you don't need to press return twice.

To make a single-line break, as with the lists of names below, press Enter instead of Return. Use this sparingly, and never use two single-line breaks instead of an ordinary Return.



Clean up pasted text (3)

The next steps probably look very different from how you use your word processor, unless you're a Word expert. To format the text further we'll be using "styles".

To turn the line "Present:" into a heading, place the cursor anywhere on that line and choose "Heading 3" from the dropdown that's second from right on the toolbar. To

make a smaller heading, choose "Heading 4". To remove a heading style, choose "Paragraph" from this dropdown.

To indent the list of names, **select the whole list** (just placing the cursor within the line won't do) and choose "indent" from the "Styles" dropdown at the right-hand end of the toolbar.

You'll find a long list of styles available in this dropdown. Most of them will make sense when we come to deal with illustrations and other advanced content. Have a play to see what they look like. To remove a style, select the whole line again and choose the name of the style that's currently applied. There's also an "Undo" button at the left of the toolbar.

Text editing toolbar buttons

Some of the toolbar buttons you can use like a word processor. From the left, the buttons are:

- Undo
- Bold (for occasional use in running text; for headings, always use one of the heading styles instead)
- Italic
- Underline (don't use this)
- Cut (or use CTRL-X / cmd-X)
- Copy (or use CTRL-C / cmd-C)
- Paste (or use CTRL-V / cmd-V)
- Paste text only (should always be highlighted yellow)
- Clear formatting (you shouldn't need to use this)
- Align left (the standard setting)
- Align centre (don't use this; if you need centred text, choose an appropriate style)
- Align right (don't use)
- Full justify (don't use)
- Bulleted list (very handy; don't try to type or paste in bullet characters yourself)
- Numbered list (very handy)
- Link to another page on stanhoe.org (should stay valid even if the page moves or changes its name)
- Link to an external web page (always select Class="external" from the subsequent dropdown, and don't forget the "http://…" or "https://…" bit)
- Unlink
- Insert image (more about this in a separate section)
- Heading styles, basic paragraph style and a couple of other basic styles
- Styles that are specific to stanhoe.org

Remember: just because it looks OK on your screen doesn't mean it will work for everyone else. That's why it's essential to use the "indent" style, for instance, instead of the tab key to line up an indented list.

While working within the stanhoe.org backend you can paste styled text from one page to another.

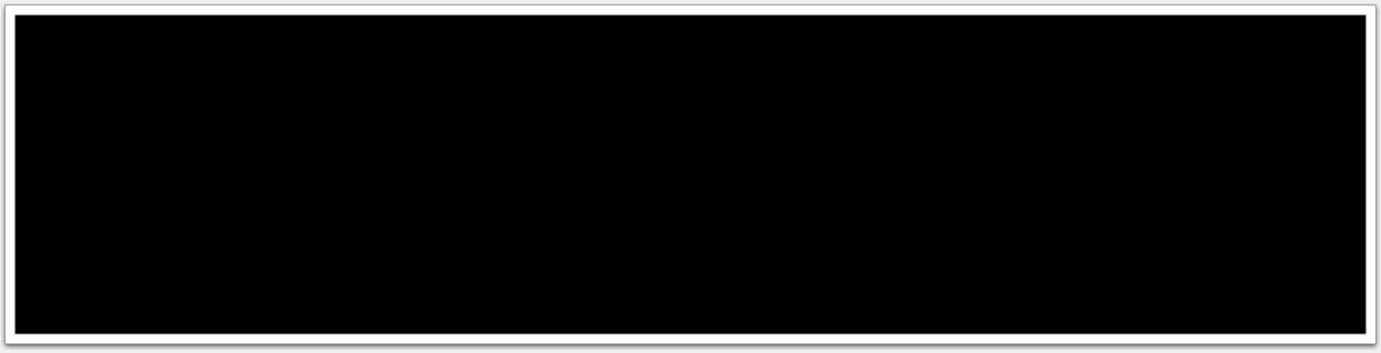
Adding an external web link (1)

To create a link to a web page that isn't part of stanhoe.org, first decide on the text you want to act as a link. Sometimes you may want this to be the actual web address, for instance "http://www.norfolkfireservice.gov.uk/nfrs/". Mostly, though, it's better to use a descriptive phrase: "Norfolk Fire and Rescue Service", "this article on pink-footed geese", or simply "click here".

Click and drag to select the text you want to act as a link.

Then click the "external link" button on the toolbar.

Follow the same procedure to edit an existing link. To remove an unwanted link, highlight the link text and click the "break link" button to the right.



Adding an external web link (2)

A pop-up window will appear. Paste the web address (URL) of your link into the top field (make sure the "http://" or "https://" is included).

From the "Class" dropdown menu, choose "external".

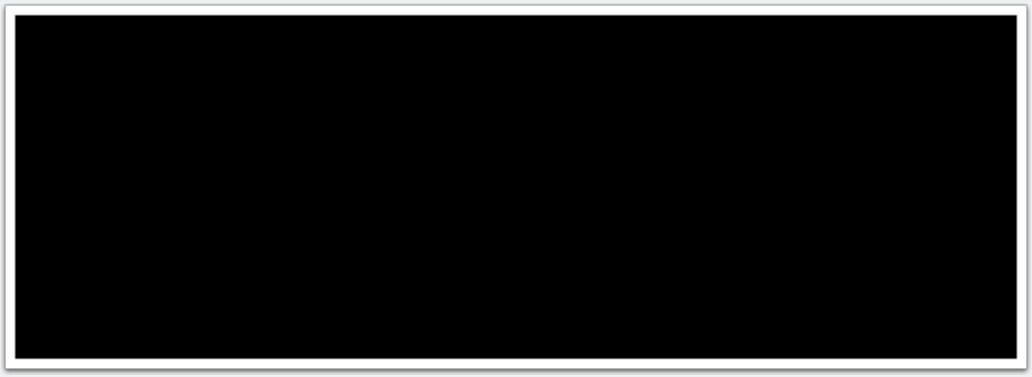
Leave the "Target" and "Title" fields blank.

Click the green "Insert" button. You will return to the main editing window. The text you selected will have turned blue, indicating that it's a link.

Adding an external web link (3)

Choosing "external" for the "Class" field in the previous step causes a little arrow icon to appear next to the published link. This signals to readers that clicking on the link will take them to a different website, not another page on stanhoe.org.

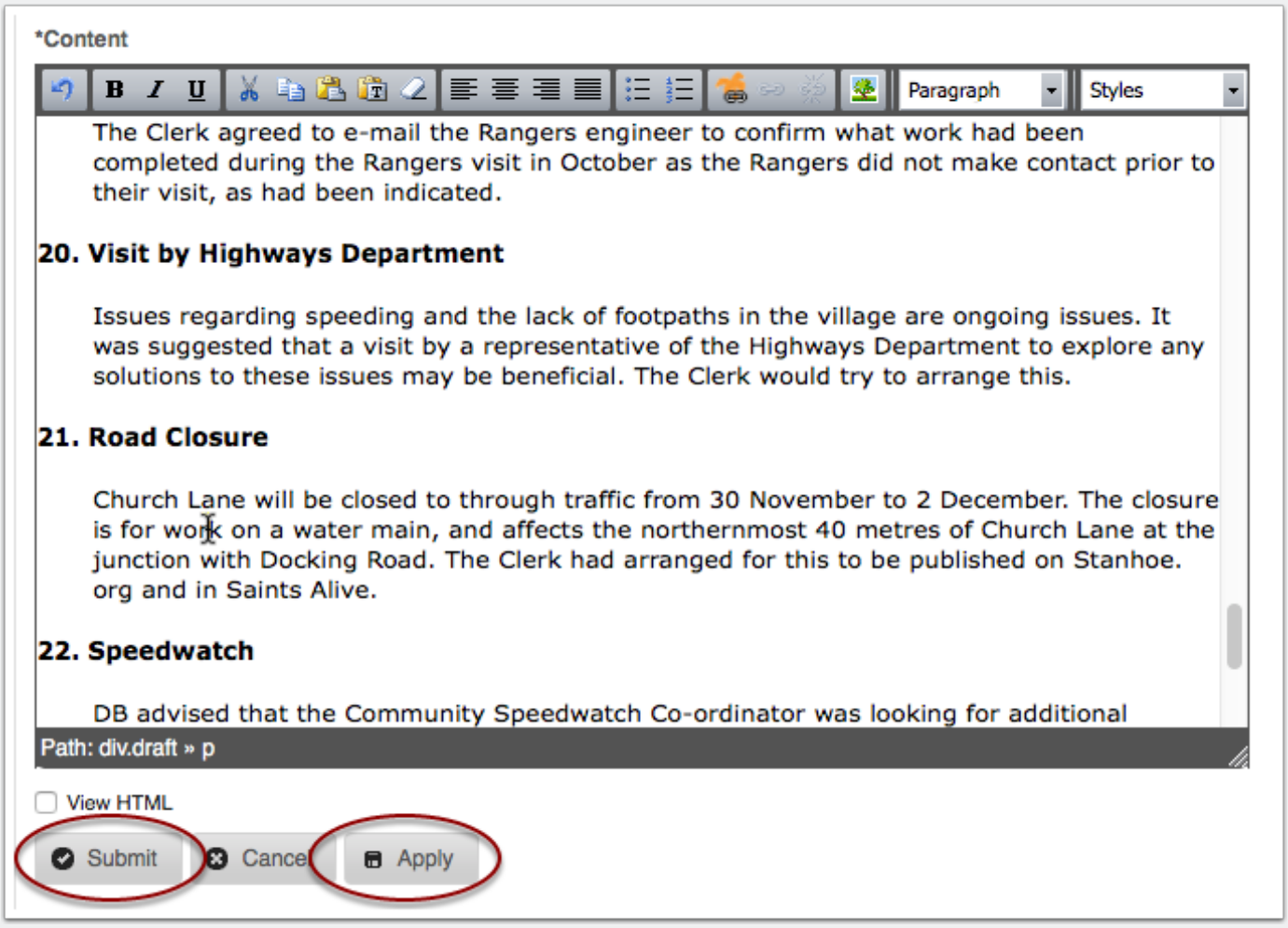
We have various other icons to show email addresses, PDF documents, MS Word documents, and so on.



Save your new page

Once you're happy with the text, click "Submit" to save your new page and return to the list of pages.

You can also click "Apply" to save your work without closing the page. It's a good thing to do this periodically while working on a long piece of text. If there's a glitch on the server, or your internet connection goes down, you may lose your work. This doesn't happen very often, but it's worth saving every ten minutes or so.



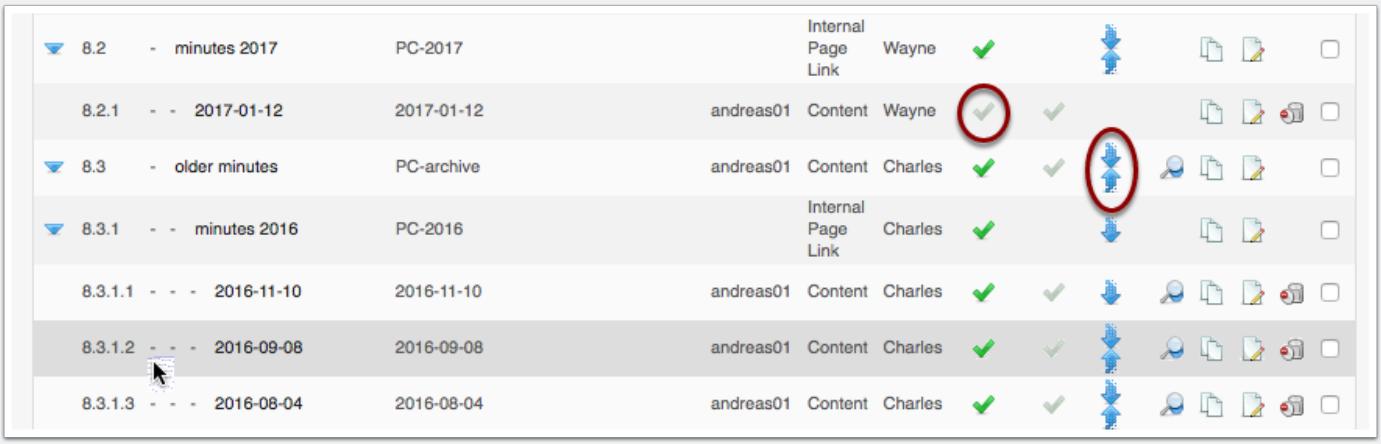
Changing page order

Once you're back in the list of pages, you will see that your new page is at the bottom of the group of pages at the same level. That may or may not be where you want it to appear on the navigation menu. For Parish Council meeting minutes, for instance, we put the most recent minutes at the top of the list.

To move a page within its own group, click the blue "up" or "down" arrow.

Note that our new "2017-01-12" page can't be moved because there are no other pages at the same level.

Once the new page is in the right place, click the "Active" checkmark if necessary to turn it from grey to green and make the page visible to the outside world. Here we need to do this because we created the page as a copy of a page that remains inactive. If you have created a new page from scratch, its status will be active by default.

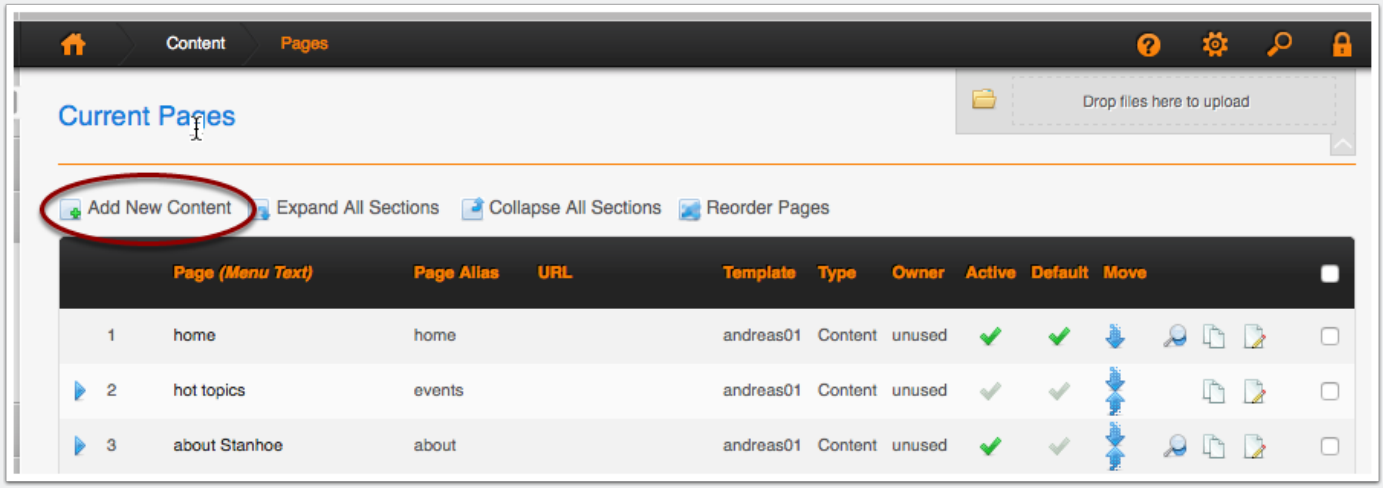


Create a page from scratch

To create a page from scratch, instead of by duplicating an existing page, click "Add New Content" at the top of the Current Pages list.

The resulting screen will look the same as in the previous example, except that you'll need to fill in the Title, Menu Text and Parent fields before entering your main page content.

When you press "Submit", the page will become active immediately (green checkmark in the Current Pages list).



The horror that lurks beneath

Why is text formatting so complicated?

Web pages are written in language named HTML. To see what this looks like, check the "View HTML" box beneath the text editing area. The content management system does

its best to shield you from HTML, but it can't always put things right if you don't use styles correctly.

It's hard to work with web content without eventually gaining some understanding of HTML, but initially at least you'll want to avoid it where you can. There are ways to make writing for the web less complicated.

One is to use a word processor that isn't MS Word. For Mac users, for instance, Nisus Writer Pro does a much better job of pasting in valid HTML, preserving formatting without introducing too many unwanted HTML codes.

Another is to use a "plain text editor" of the sort favoured by programmers. Because these don't support styled text, they filter out any garbage that you paste in from MS Word. A couple of free examples are EditPad Lite for Windows (https://www.editpadlite.com) and TextWrangler for Mac (http://www.barebones.com/products/TextWrangler/).

The final refinement – and the one I use – is to use a specialist text editor based around a simple formatting language known as Markdown. That's beyond the scope of this tutorial, but is definitely the way to go if you want to take things further.

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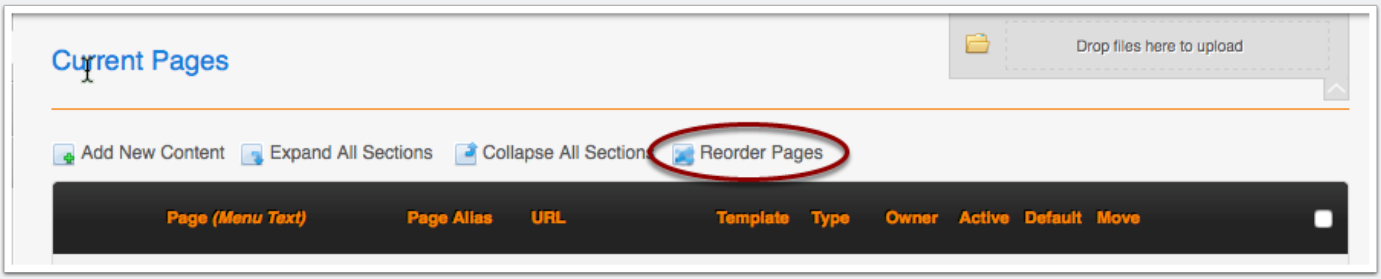
```
<div class="draft">
<h3 style="text-align: center;">Draft Minutes of Parish Council Meeting</h3>
<h4 style="text-align: center;">Held on Thursday, 12th January 2017 at
7.00pm<br />in the village Reading Room</h4>
<p style="text-align: center;">Clerk to the Council - {emailaddress
mailbox="parishclerk" domain="stanhoe.org" name="Wayne Leighton"}, tel 01485
518570</p>
<hr />
<h3>Present:</h3>
<p>Mr. D. Lord (DL) Chairman<br />Mr D. Bridge (DB)<br />Miss. R. Brown (RB)
<br />Mrs. J. Lord (JL)<br />Mr. D. Vincent (DV)</p>
<h3>Apologies:</h3>
<p>Mr M. Roche (MR)</p>
<p>In Attendance:</p>
<p>A number of members of the public attended the Better Broadband for
Norfolk presentation.</p>
<p>1. To consider apologies for absence:</p>
<p>The Clerk had received apologies from MR.</p>
<p>2. To consider approval of the Minutes of the last meeting held on 8th
```

Moving pages around (1)

The blue "up" and "down" arrows in the Current Pages list can only move individual pages within their current groups.

To move a whole group (a page with its sub-pages), or to move a page to a different parent page, click "Reorder Pages" at the top of the pages list.

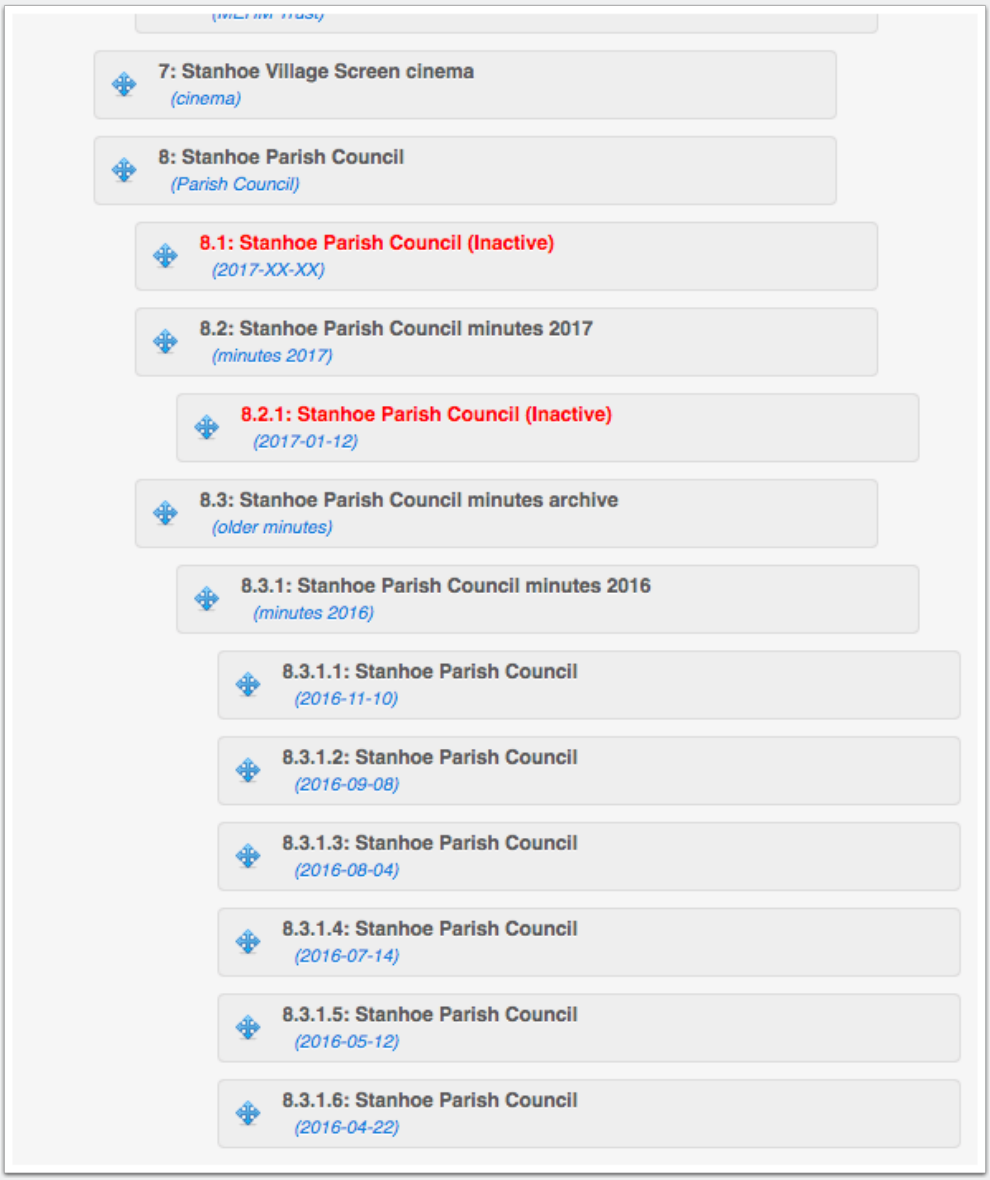


Moving pages around (2)

Clicking "Reorder Pages" takes you to a screen showing every page, indented according to its position in the hierarchy. Click and drag to move individual pages or groups of pages around.

Because there's no way to collapse selected groups of pages, this can be a tedious operation.

Click "Submit" when you're done, or "Revert all changes" if it all goes horribly wrong.



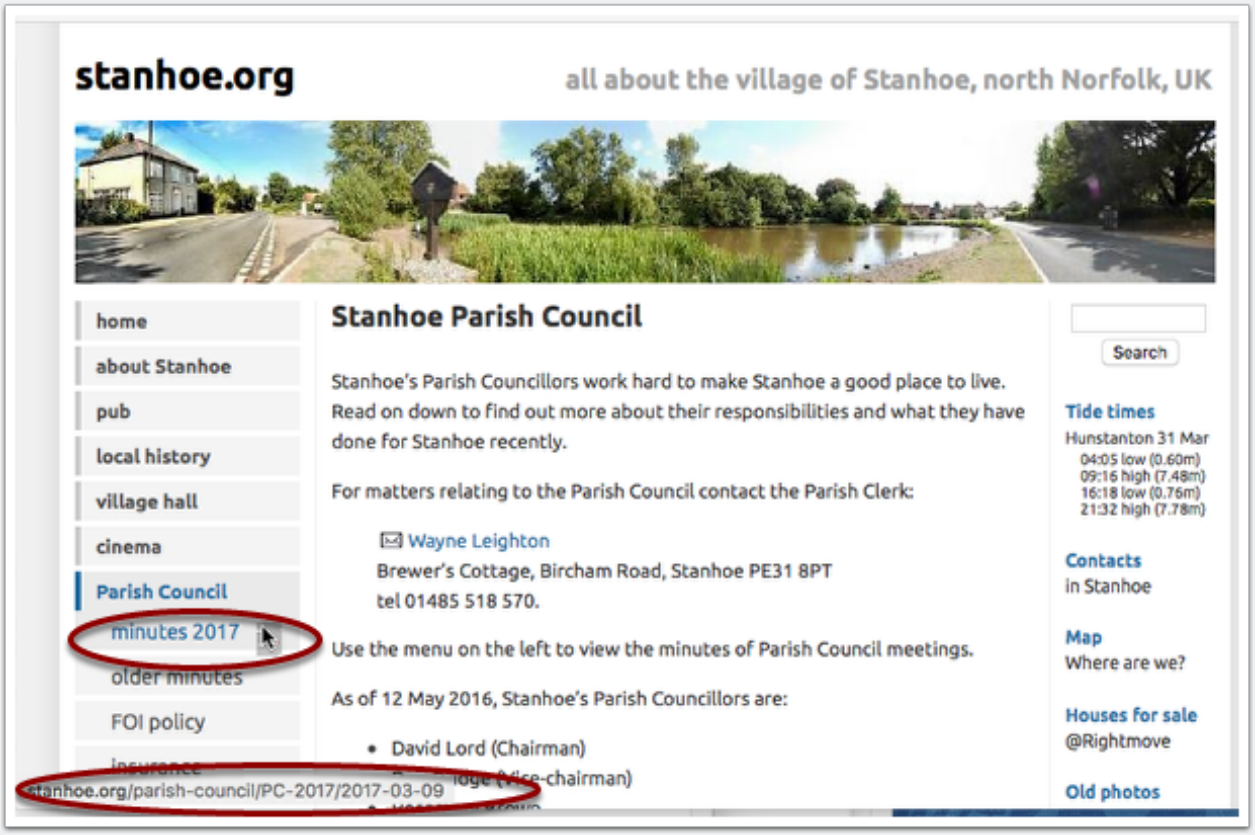
Link pages (1)

When is a page not a page?

Editing the Stanhoe website

In the screenshot below, hovering your cursor over the menu item "minutes 2017" shows that clicking here will take you directly to http://stanhoe.org/parish-council/PC-2017/2017-03-09. That's a particular set of Parish Council minutes – in this case the latest minutes at the time of writing.

An internal page link like this is a handy way to direct people to the latest document in a series. In this case it saves having to first open a list of minutes, and then choose the month you want to see. There's a sub-menu that allows visitors to view previous minutes, but the assumption is that they are most likely to want the latest document.



Link pages (2)

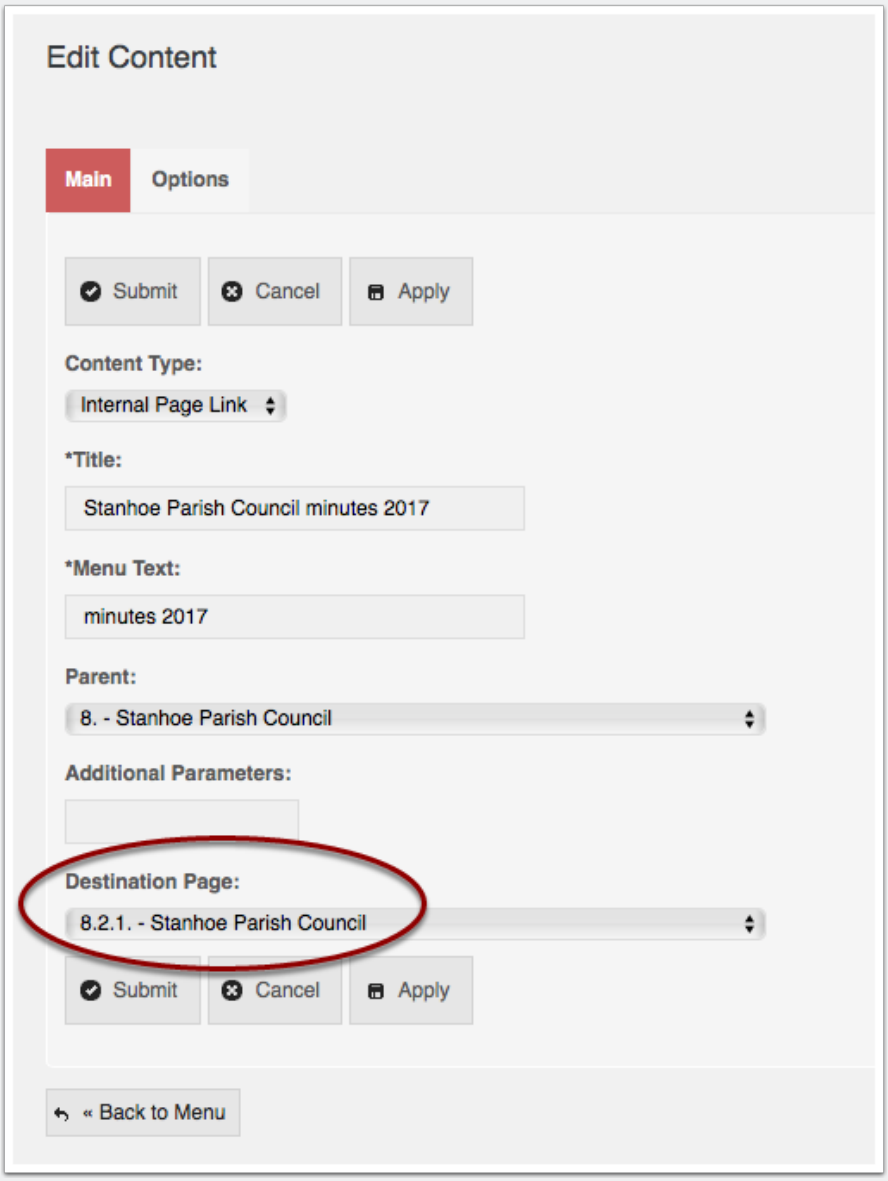
Look closely at the Pages list and you'll see that "minutes 2017" is described as an "Internal Page Link" rather than a "Content" page. Unlike a standard page, it has no content of its own; it's simply a pointer to another page.

Link pages (3)

Editing our link page reveals the options below. The key one is "Destination Page:". Change this to point to whichever page you want to target.

Choosing the destination page can be tricky when a series of pages all have the same title (in this case "Stanhoe Parish Council"). The trick is to get your pages sorted into the right order first. Then set the destination page to be the one at the top or bottom of the list, depending on how the pages are ordered.

Note that you have the option to change the "Content Type:" of the page. In almost every case this should be either "Content" or "Internal Page Link".



Uploading documents (1)

Sometimes it's necessary to work with standalone documents. Examples include:

- official documents whose format must not be altered;
- documents such as reports that are too long or too complex to convert to ordinary text on a web page;
- large maps;
- posters that people may want to print out;
- forms that need to be printed; and
- sound recordings and music tracks.

In general, all downloadable documents should be in the form of PDF files. PDFs have several advantages:

- they can be viewed on almost any device;
- PDF viewers are available free of charge, and are typically installed by default on new computers and tablets;
- many web browers allow PDFs to be viewed easily without a separate download step (though this does depend on the device);
- a properly-made PDF will always look exactly as it's supposed to, with no unexpected formatting changes;
- basic PDFs are relatively tamper-proof;
- if security is an issue, a PDF can easily be password-protected to control who may open the document, print it or copy material from it.

Please don't upload Microsoft Word files unless you have a good reason. Problems with MS Word include:

- MS Word is commercial software that not everyone can afford, or has the skills to install and update;
- using proprietary file formats for public documents goes against the spirit of open government;
- there are many versions of MS Word, and you cannot be sure that someone else's version will show your document correctly (this is especially true of fonts);
- MS Word documents are easy to tamper with, and security options are limited.

If you must upload a word processor document for any reason, ODT is the "open" file format of the future as public organisations move increasingly away from Microsoft and other proprietary products. For the moment, RTF is a practical alternative that is likely to be readable by more people.

Editing the Stanhoe website

Before you upload a document, ask yourself whether it needs to exist as a standalone file. For short documents where it isn't vital to preserve the original formatting exactly, it's often better to copy the text and convert it to HTML. Compared to a web page, a standalone document is more difficult to view and will not be indexed by CMS Made Simple, so you can't use the search box to locate the contents of the document.

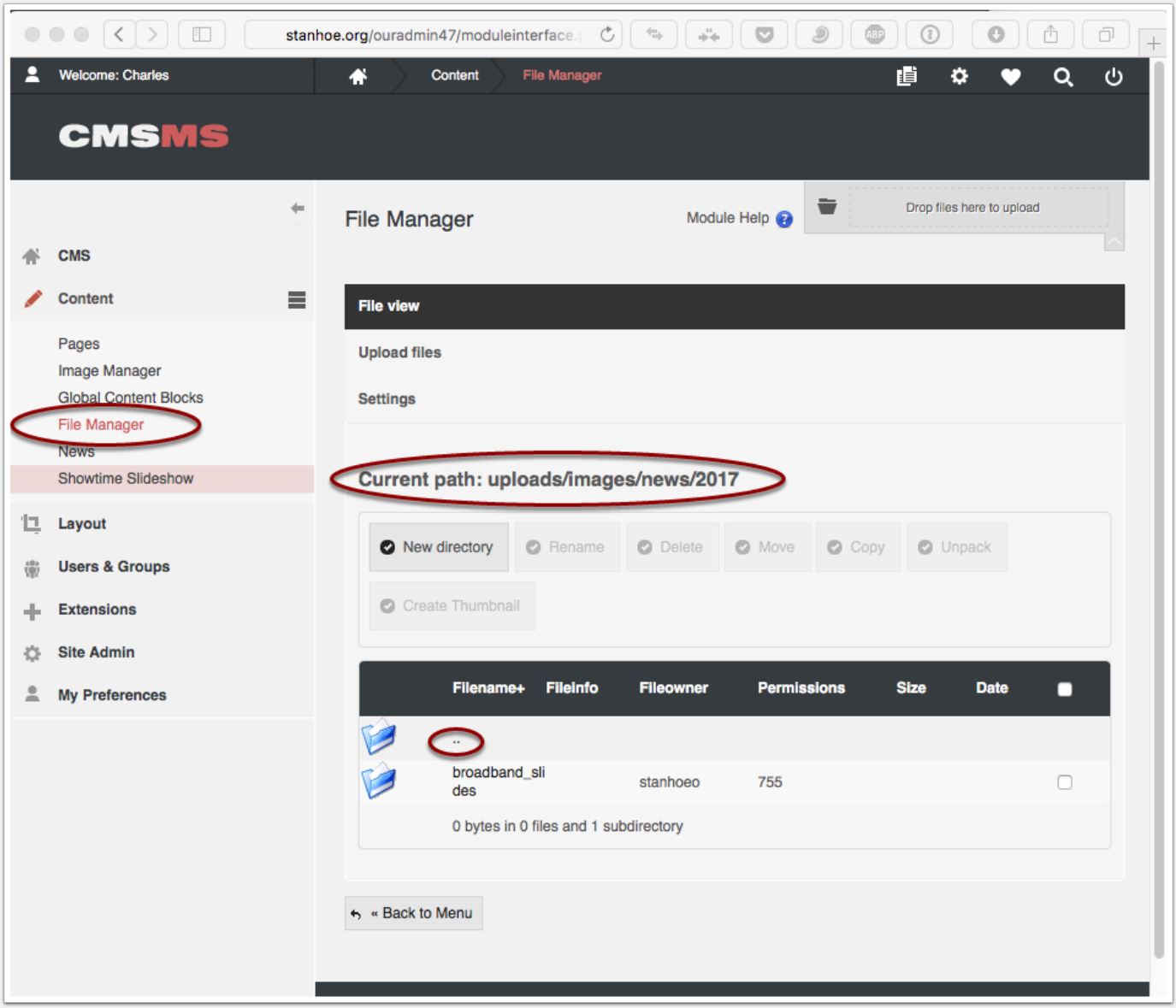
Uploading documents (2)

Once you've decided that a standalone document is needed, prepare your PDF file. From MS Word, the "File > Save As…" menu item (or its equivalent in other operating systems) will normally include an option to export as a PDF. Many other programs offer similar functions – look for "Save As…" or "Export…". On Macs, the Print dialogue also offers the option to create a PDF.

Give your PDF an appropriate name, if possible one that's consistent and unambiguous. Replace spaces with hyphens or underscores. In this case our file is named "Public-Rights-Notice-31-March-2017.pdf".

From the left-hand sidebar choose "File Manager" and navigate to the folder where you want to place your new document. Click the ".." button to move up one level in the folder hierarchy. The "Current path:" label shows where you are in the hierarchy.

The File Manager is like a more powerful version of the Image Manager. Whereas the Image Manager is restricted to the folder "uploads/images", the File Manager shows additional folders in the "uploads" folder. In CMSMS v2.x these two functions have been streamlined into a single File Manager.

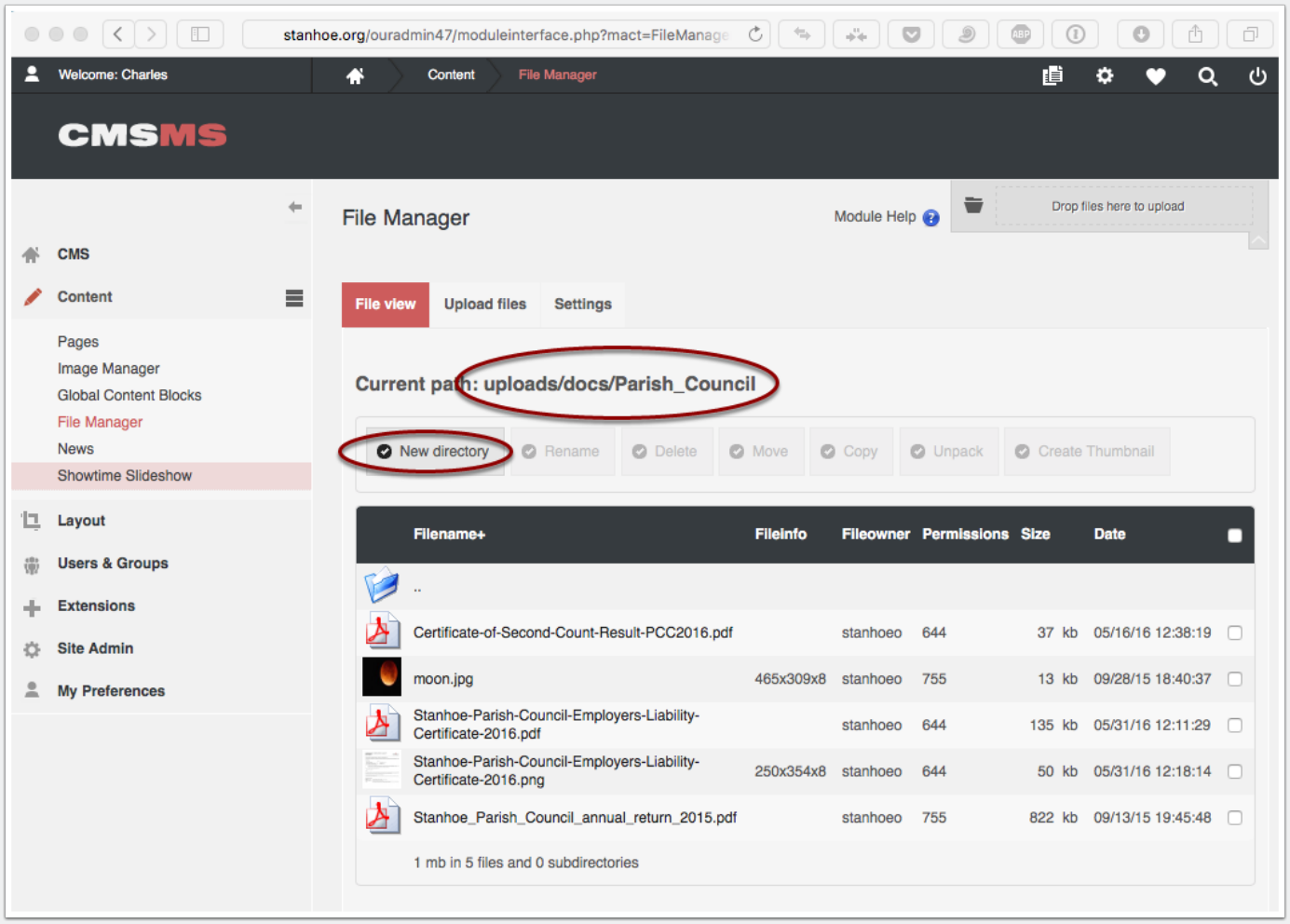


Uploading documents (3)

Here we've clicked on the ".." button (three times in total) to navigate up the folder ("directory") tree to "uploads". We've then clicked on the sub-folder names to navigate

back down another branch of the tree: first to "uploads/docs" and then to "uploads/docs/Parish_Council". Try to file documents consistently because this makes it a lot easier to find them again (notice how a photo of the moon has been mis-filed here).

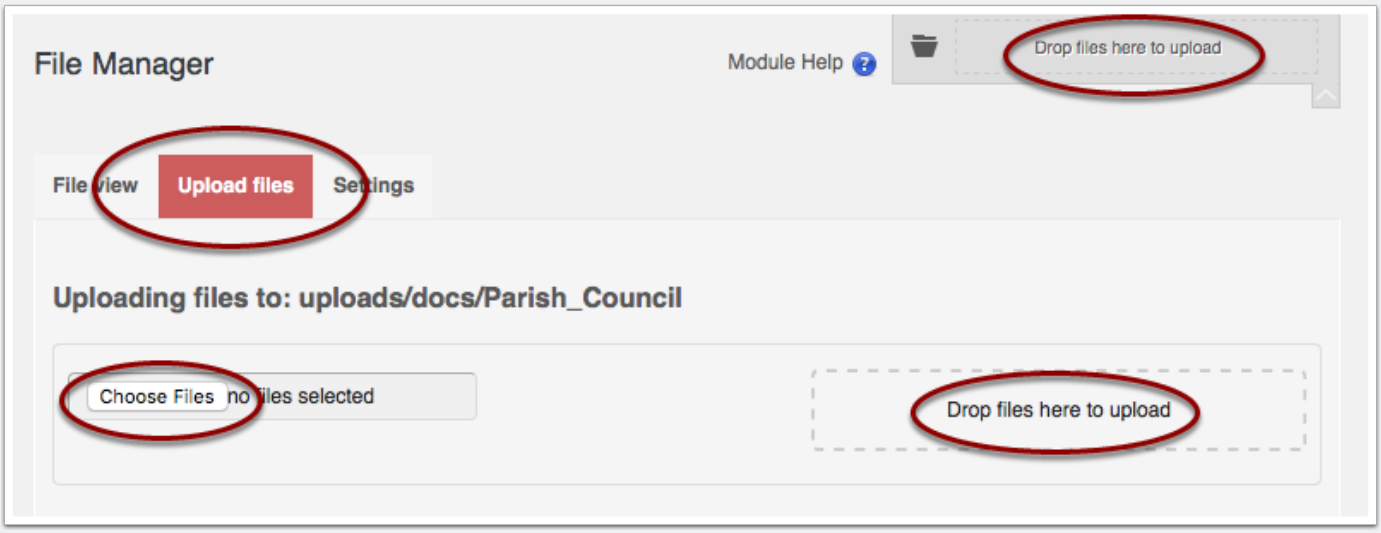
If you need a new sub-folder, perhaps at the start of a new year, click the "New directory" button.



Uploading documents (4)

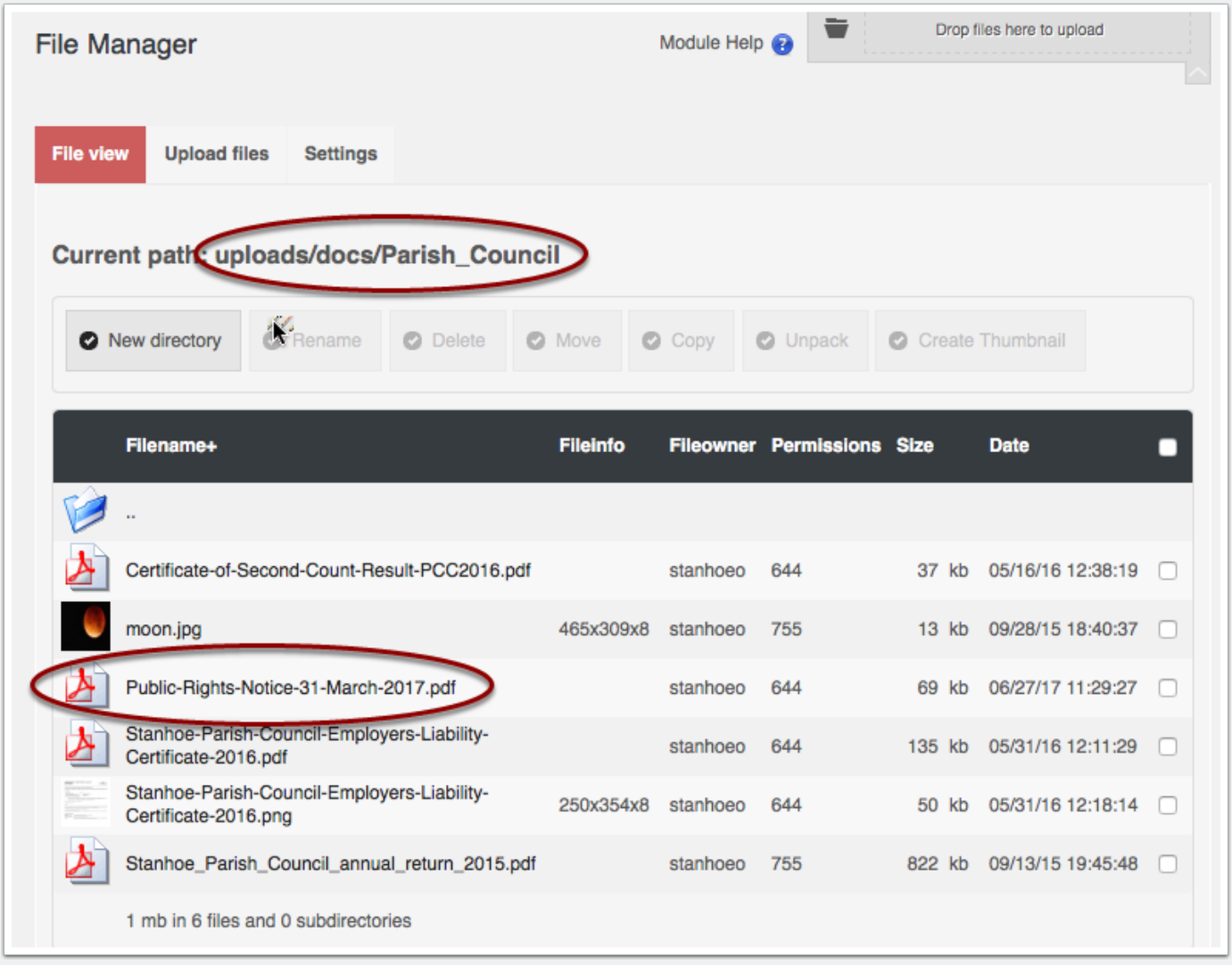
Click the "Upload files" tab and click the "Choose files" button. This will open a dialog in your computer's file system. Navigate to your document and click the "Choose" button to upload it.

Alternatively, drag and drop your file onto either of the two areas labelled "Drop files here to upload".



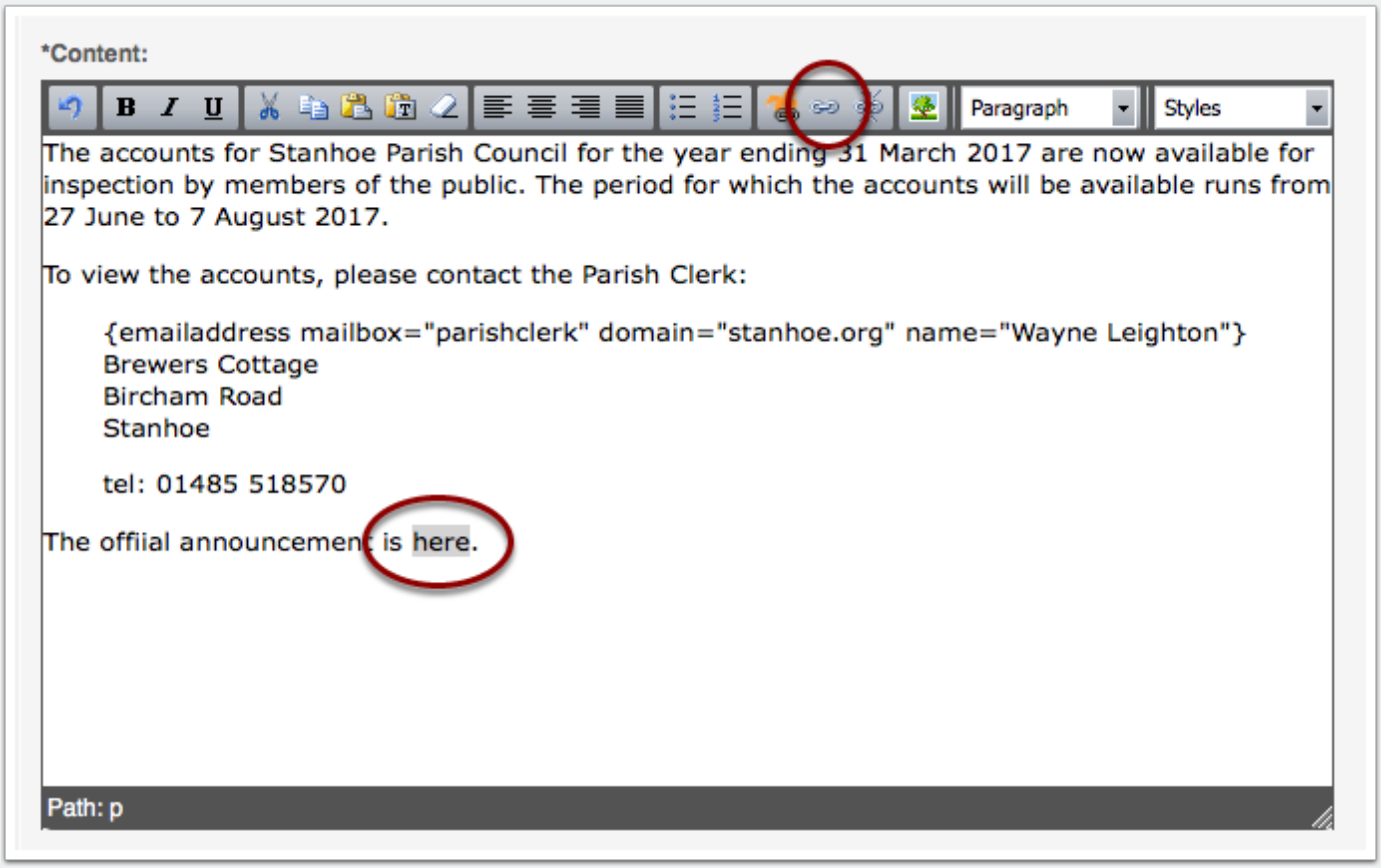
Uploading documents (5)

Back in the "File view" tab you should now see the document you've just uploaded.



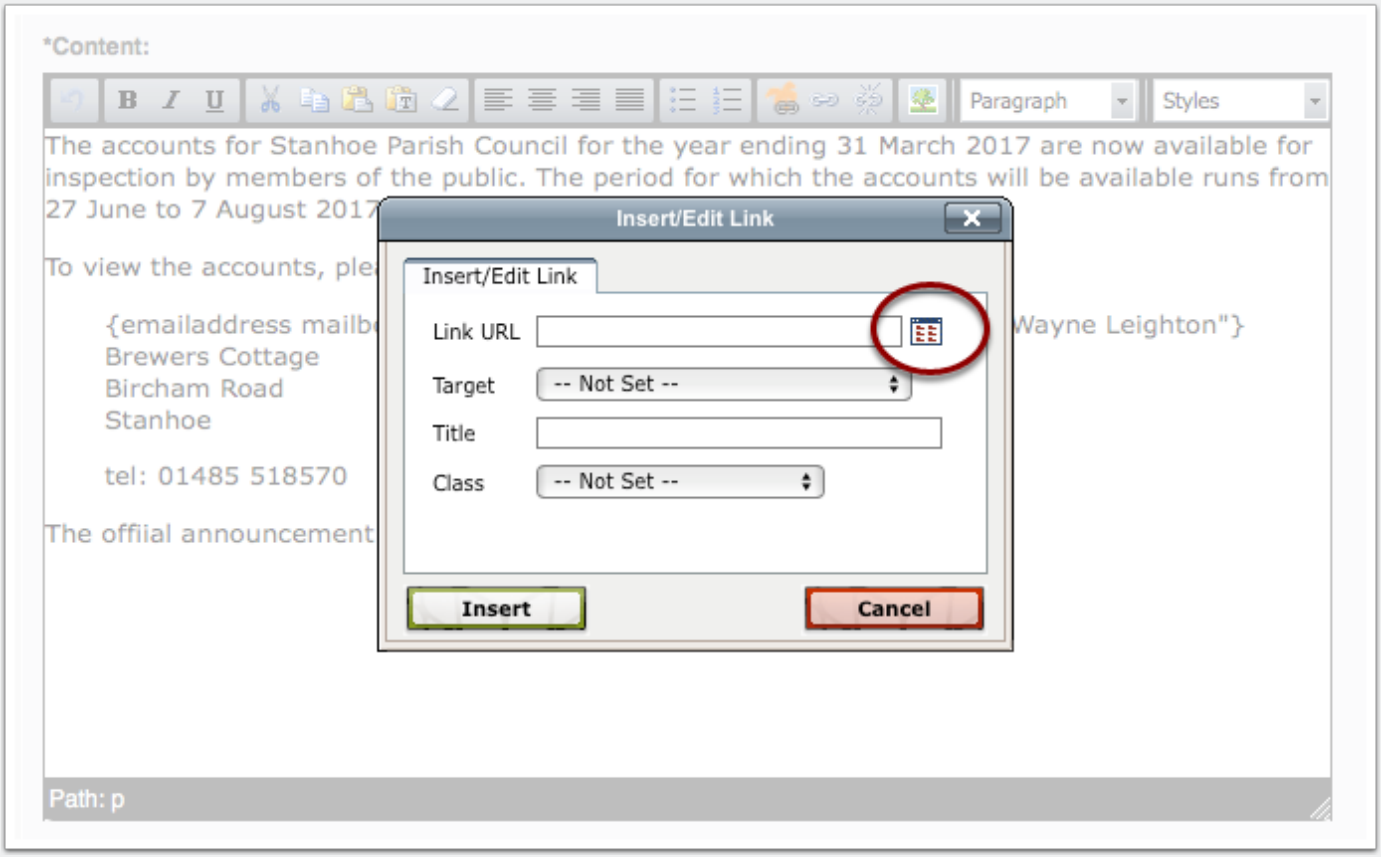
Linking to an uploaded document (1)

The final step in dealing with uploaded documents is to create a reference to your new document in a news story or web page. In this case we'll use a news story. We want the word "here" to act as the link to the new document. Highlight the link word and click the "Link" icon in the toolbar:



Linking to an uploaded document (2)

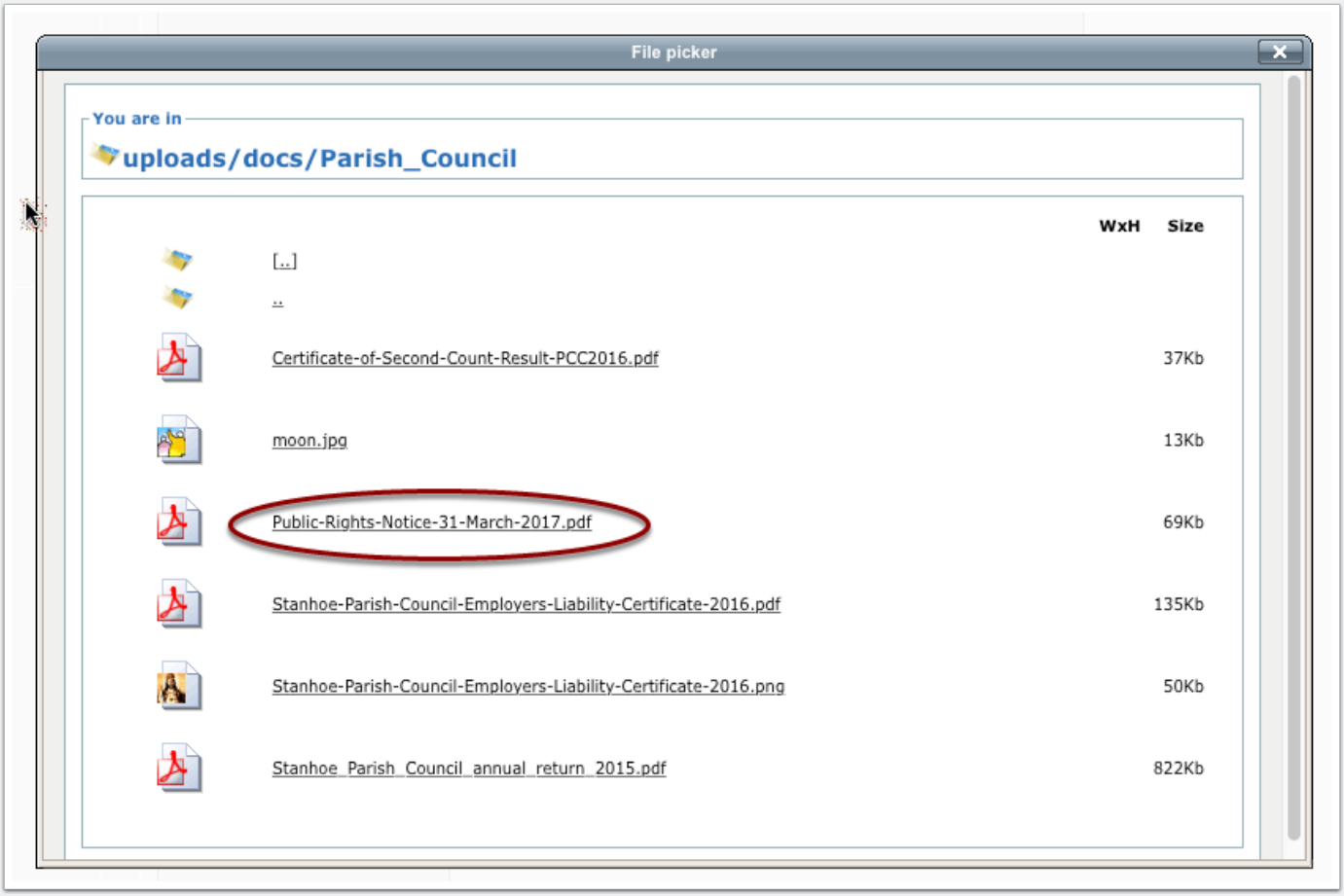
The "Insert/Edit Link" dialog looks very much like the one for inserting images. Click the button on the right to open a file browser (you could also paste in the path of the document, if you have it written down).



Linking to an uploaded document (3)

If the directory you want doesn't show up immediately, navigate to it. Click on the ".." link to go up in the folder hierarchy, and click on a folder name to open that folder.

Once you've found your file, click on its name to insert the link.



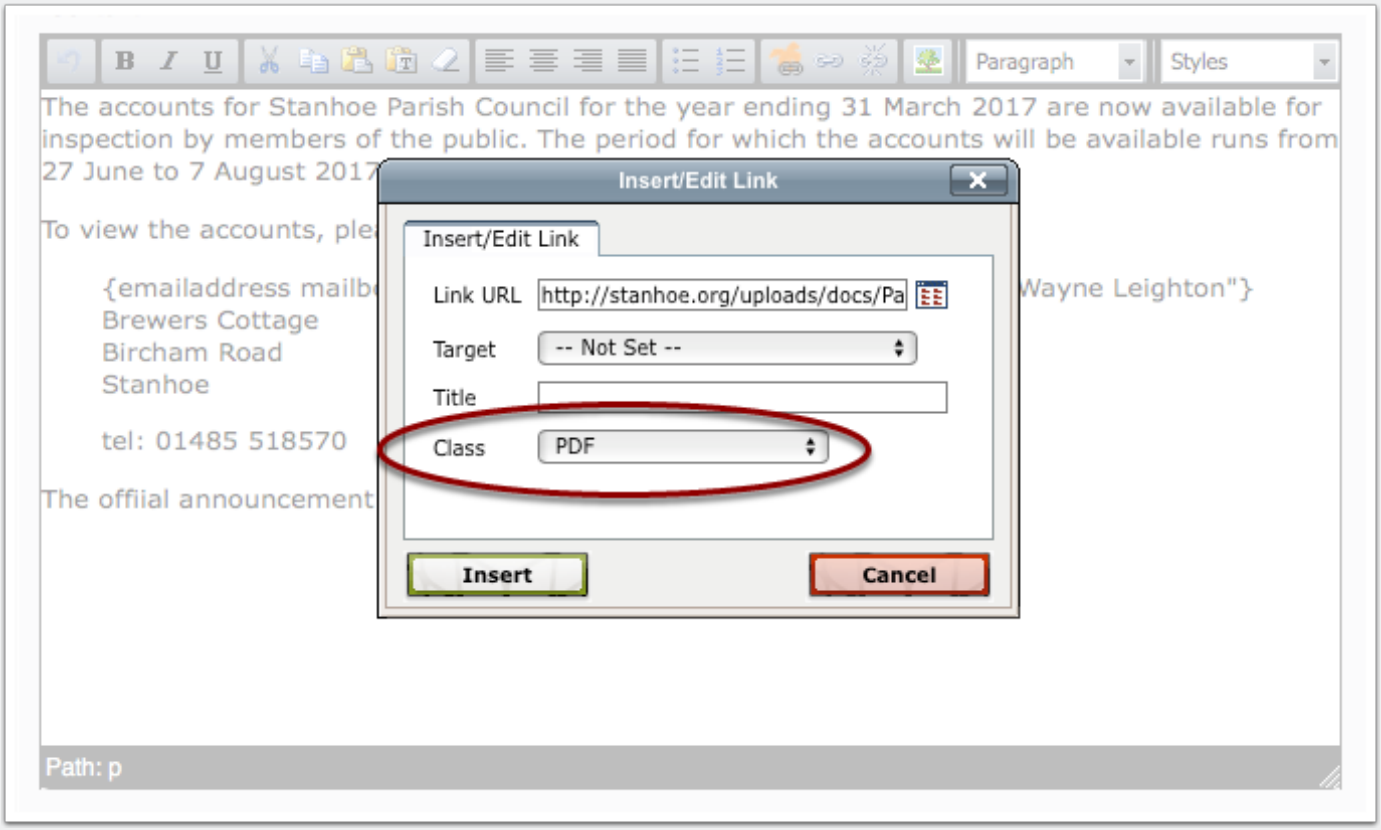
Linking to an uploaded document (4)

The "Insert/Edit Link" dialog will show the full path to your document file.

From the "Class" dropdown menu, choose "PDF" (assuming it's a PDF document, of course). This ensures that the link will show up on the web page with a "PDF" icon, so people know wnat to expect. If the file is large (over 1 MB, say) it's a good idea to

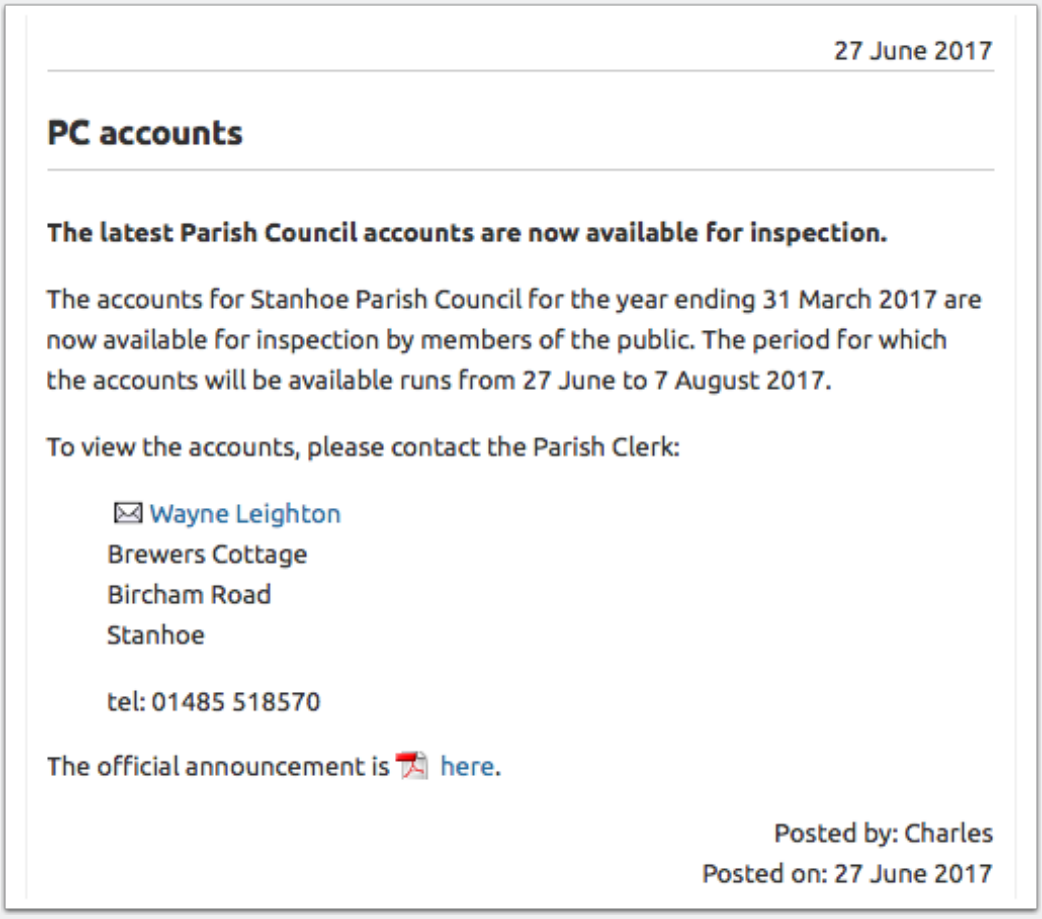
mention this in the text. For example, you might write: "Click here to view the report (5 MB PDF file)".

Click the green "Insert" button and save or publish your news item or web page.



Linking to an uploaded document (5)

Check the published item to make sure everything looks OK. Don't forget to test the link by clicking on it.



27 June 2017

PC accounts

The latest Parish Council accounts are now available for inspection.

The accounts for Stanhoe Parish Council for the year ending 31 March 2017 are now available for inspection by members of the public. The period for which the accounts will be available runs from 27 June to 7 August 2017.

To view the accounts, please contact the Parish Clerk:

Wayne Leighton
Brewers Cottage
Bircham Road
Stanhoe

tel: 01485 518570

The official announcement is here.

Posted by: Charles
Posted on: 27 June 2017

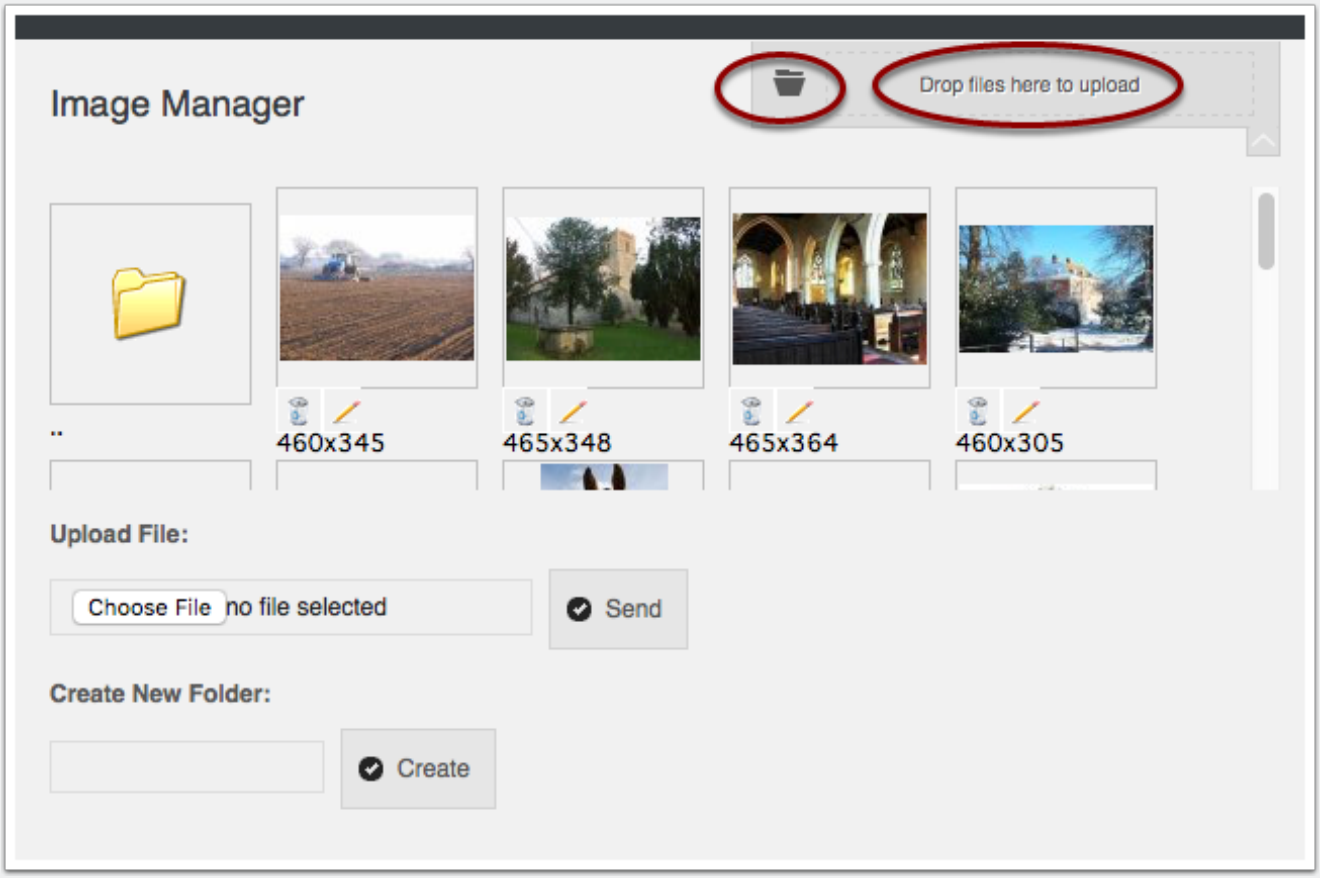
Drag and drop to upload files

Whenever you are in either the File Manager or the Image Manager you will see at least one area labelled "Drop files here to upload".

This is a convenient way to upload both images and document files. However, beware of an inconsistency.

In the File Manager, dragging and dropping will always upload to the directory you are viewing (which is normally what you want).

In the Image Manager, the destination directory may not be the one you are currently viewing. The destination is "sticky", and is set by clicking the "folder" icon to the left of the drag-and-drop area. If you don't check this before uploading a file, you are likely to send it to the wrong directory.



More to come…

Congratulations on posting your first news story or editing your first page. In forthcoming sections we'll show you how to add images, and more…

Happy editing

Charles