

# Content Management Server



## Purpose:

In this document, the necessary steps to create or edit web pages with Microsoft's Content Management Server will be outlined and illustrated.

## Objectives:

1. What is Content Management Server?
2. Who can edit USF Health websites?
3. Logging into CMS.
4. Locating your website in CMS.
5. What you can and cannot edit.
6. How to create a new page.
7. Page Content:
  - Formatting text
  - Inserting tables
  - Inserting images, attachments and hyperlinks.
8. Header Text and Page Title.
9. Meta tags for search engines.
10. Previewing your website.
11. Saving and uploading a new/edited page.
12. Headings (CSS)
13. Resource Galleries.
14. Creating a custom left menu.
15. Creating a custom right menu.
16. How to edit an existing page.

Appendix A: Terms.

Appendix B: How to request permission from Heath IS to edit websites.

# Content Management Server



## What is Content Management Server?

"Now, with Content Management Server 2002 Standard Edition, organizations of all sizes can build their Web strategy on a solid foundation. Content Management Server Standard Edition offers a comprehensive Web-content management solution designed to increase the productivity of your IT staff, while enabling you to rapidly deploy your Web site on an easy-to-update platform to connect with customers and partners over the Web."

(taken from <http://www.microsoft.com/cmsserver/evaluation/introduction.mspx>)

Essentially, Content Management Server is software created by Microsoft which allows large organizations, such as USF Health, to create a host of uniform websites which all have the same look and feel.

## Who Can Edit USF Health Websites?

Anyone affiliated with USF Health, that is, students, staff and faculty can gain permission to edit USF Health websites. Each organization, club, or department will assign someone(s) to edit their website. If you have been chosen to do this, you or the supervisor must contact USF Health IS to request permission to become an editor of a specific entity's websites.

\*\*Note: This is a content maintenance program, you will be able to edit content, add pictures, web links and maintain your site. This program will not allow you to web designs for example Floating photos, Flash, or RSF Feeds. If you are looking into specifics please contact the Application Development Department to see if your request is feasible with the program.

## Logging Into CMS:

1. Start by typing in the URL:  
<http://hscm2.hsc.usf.edu> (notice there is NO "www.")
2. On the login screen, type in your HSC ID and password.

**Authentication Required**

Please ensure that cookies are enabled in your browser and try again.

Domain

▼

User Name

Password

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## Locating Your Website in CMS

Once you login, you will see a list of all the websites for USF Health. The first step is to click on the top link Switch to Edit Site. Then navigate through the tree to the site you will be working on. For example, if you are a new editor for a student organization in the College of Public Health, you would start by clicking on the College of Public Health link, then the Student Organizations link, and then the name of your organization.

This is the default page for a new website in the HSC Content Management System. To replace this page with actual content please create a posting called "index" in the webspace on the Content Management Server. The index page will become the default page for this website.

[Switch To Edit Site](#)

**Reminder: you must approve your pages in order for pages to be published to the Internet.**

This page falls within the following websites at USF: [USF Home](#)>[HSC Home](#)>

This is the root website.

This website has the following sub websites:

- [College of Medicine](#)
- [College of Public Health](#)
- [College of Nursing](#)
- [Health Sciences Media Center](#)
- [Shimberg Health Sciences Library](#)
- [AHEC Program](#)
- [HIPAA](#)
- [Professional Integrity Office](#)
- [Information Technology](#)
- [Shops](#)
- [About the Health Sciences Center](#)
- [Board of Trustees Health Sciences Workgroup](#)
- [Business Affairs and Technology](#)
- [Faculty Affairs](#)

Switch To Edit Sites

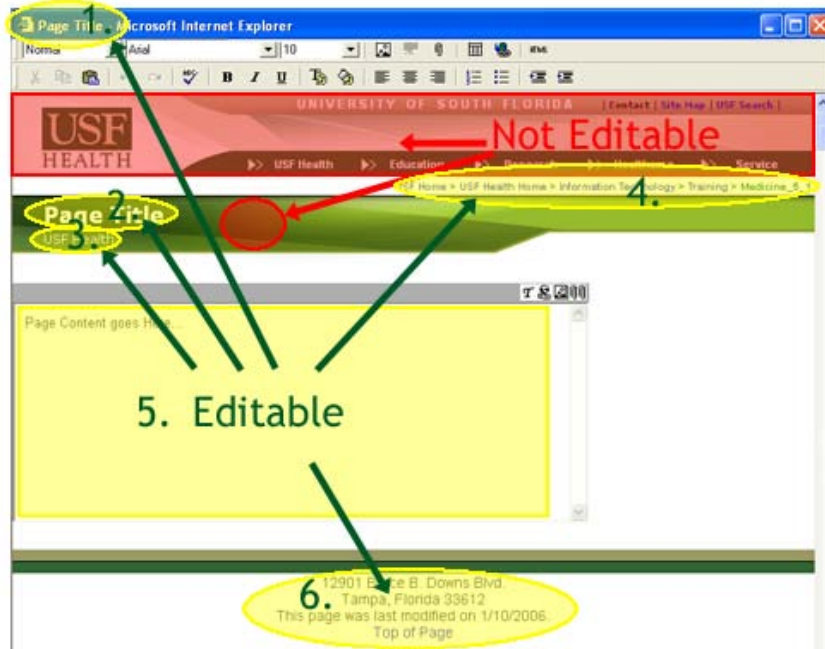
College of Public Health

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## What You Can, and Cannot Edit

1. You cannot edit the USF Health banner, or change the color of the Page Title banner.



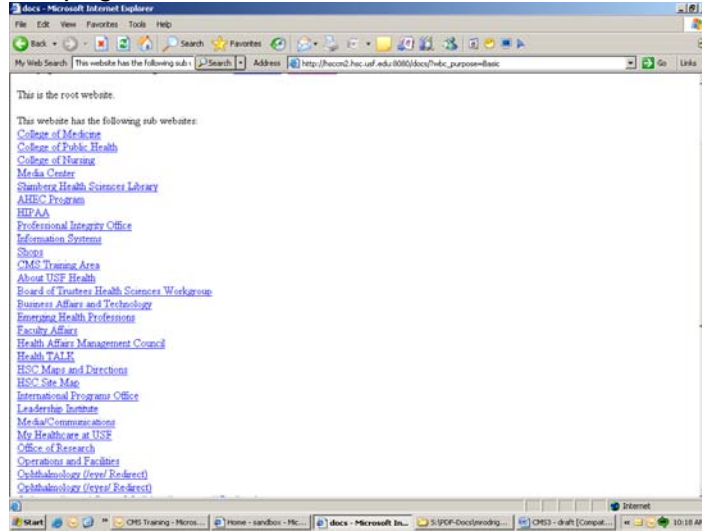
2. You can edit all of the following areas: 1. Browser Title, 2. Page Title, 3. Page Subtitle, 4. Birdcrumbs, 5. Page Content, and 6. Page Footer. You can also add a left and right menu (not pictured).

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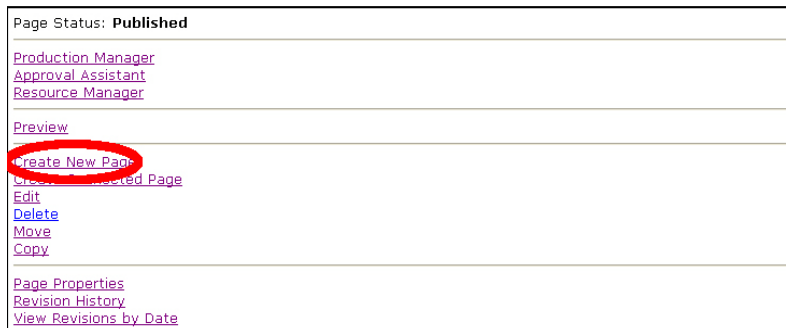


## Creating a New Page The Web Author Console

1. Navigate to your main page.



2. Once you have navigated to your main page, scroll down to the bottom of the screen to find the Web Author Console, which looks like this:



3. In the Web Author Console, click the Create New Page link.

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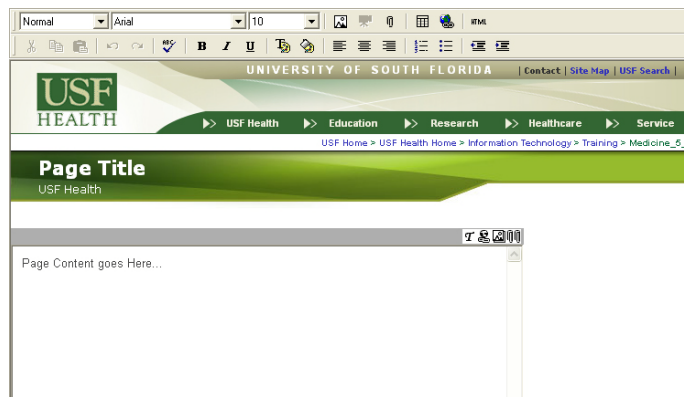


## The Template

1. You will then be directed to the **Template Gallery**. Select the **Medicine\_5\_1** template by clicking on the hand icon in the **Select** column.

Template	Select	Last Modified
COM_no_level		Dec 15 2004, 03:15:11 pm
medicine level 4		Mar 31 2005, 02:15:11 pm
medicine level 5		Mar 31 2005, 02:15:16 pm
MD admissions level 4		Apr 09 2005, 10:22:17 am
Medicine_5_1		Jan 10 2006, 03:29:56 pm

2. You will then be directed to a blank CMS page. In order to view this screen you will need to install Active X which will pop up underneath your web browser.



Each college now has its own color. USF Health in general will use the color green. The colleges are as follows:

- College of Medicine: Blue
- College of Public Health: Purple
- College of Nursing: Yellow

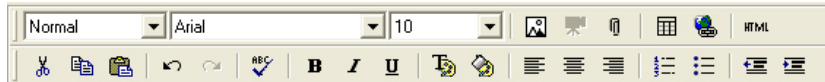
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## Creating Content.

### Text

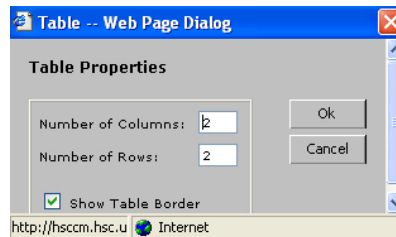
1. All the editing capabilities for CMS are found in the Editing Menu at the top of the editing screen.



2. Adding and editing text in CMS is much like Microsoft Word, with a few limitations.
3. Font size ranges from 8 pnt. to 36 pnt.
4. Most of the font styles available in Word, are available in CMS.
5. Bold, italicize and underline are also available, and there is a limited pallet of colors for text as well (please refer to the Editing Menu side bar on this page.)

### Table

1. To insert a table click the Insert Table icon in the Editing Menu. This will open the Table dialogue box.



2. The Table Dialogue Menu is defaulted to the values you see above. To change the number of columns or rows, simply type in a different number. The "Show Table Border" check box at the bottom controls whether or not the cell grid appears on the website. Type in the number of columns and rows, decide whether or not to show the table border, then click OK.

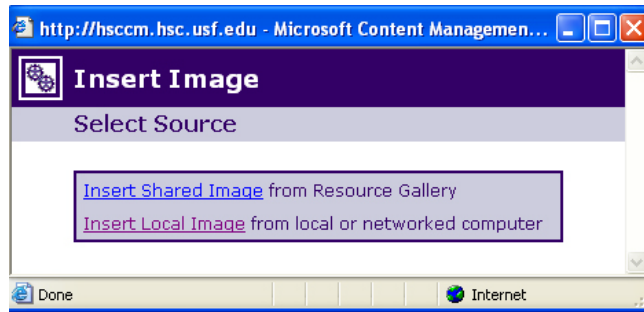
**NOTE:** Once a table has been inserted, there is no way to make any changes to the table; this includes the number of columns or rows, and the color of the table border (which will always be white). If you need to make changes to the table, you must recreate it.

# Content Management Server

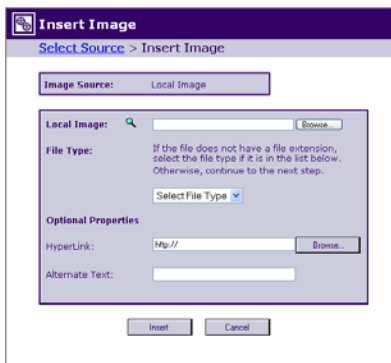


## Images

1. To insert an image, click the Insert Image icon in the Editing Menu (please refer to the Editing Menu side bar on this page.)
2. The Insert Picture dialogue box will appear.



3. Choose to either Insert Shared Image, or Insert Local Image.
4. Inserting a Shared Image, will import a picture from your Resource Gallery (Please see pg.17 for more information on Resource Galleries).
5. Inserting a Local Image will allow you to browse the computer's hard drive for a saved image.  
\*NOTE: Images should be in one of the following three image formats: .jpeg, .gif or .png.



6. Click the "Browse" button to locate the image on your computer.

The remaining options on this screen do not require any input. Once you have selected the picture to insert, click the "Insert" button at the bottom.

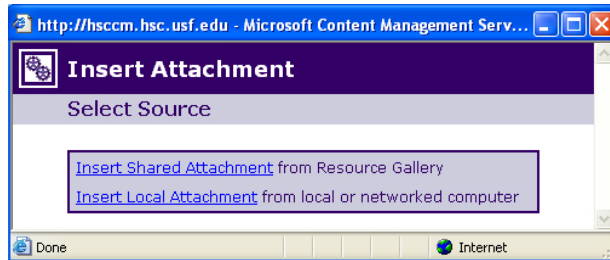
7. Click the "Browse" button to locate the image on your computer.
8. The remaining options on this screen do not require any input. Once you have selected the picture to insert, click the "Insert" button at the bottom.

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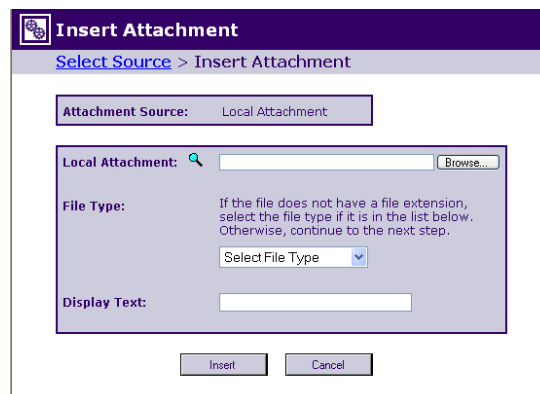


## Attachments

1. To insert an attachment, click the Insert Attachment icon in the editing toolbar (Please see the Editing Menu sidebar on this page).
2. A dialogue box similar to the Insert Image dialogue box will appear. Again you to either import a local or shared attachment.



3. You can attach any file type you wish. The only consideration is that those who want to view the document will need to have the appropriate software to open it. For example, if you attach a PDF file, those who want to view the attachment must have Adobe Acrobat Reader on their computer.
4. Once you have chosen a file to attach, you do not have to choose a "File Type," however in the "Display Text:" box, type in the text that will appear as a hyperlink for the file on the website. Finally, click "Insert."

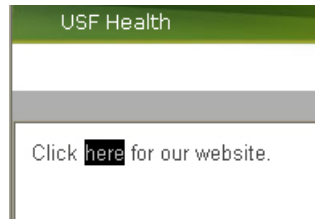


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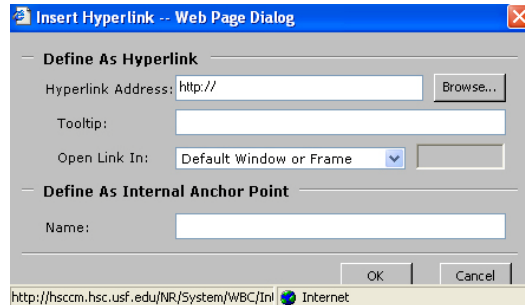


## Hyperlinks

1. First, select the text you would like to be the hyperlink.



2. Click the "Insert Hyperlink" button in the editing menu.
3. The Insert Hyperlink dialogue box will appear. You have the option to either select an internal, pre-existing USF Health website, or an external website.



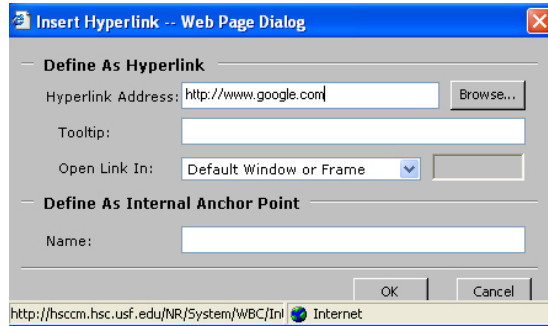
4. To select an internal website, click the "Browse" button. A menu of all the USF Health web pages will appear. Click the "+" buttons until you find the site you want. Once you have found the desired website, click on the name, then click the "OK" button.



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5. If you want to insert a link to an external website, simply type in the website's URL, then click the "OK" button.



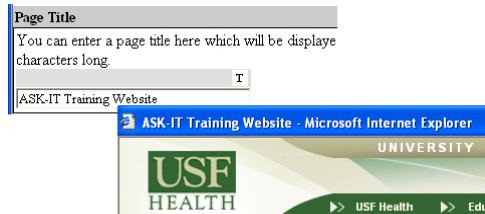
Tips: You can open a new window and do external linking also.

## Header Text and Page Title

1. The new templates allow you to edit the **Header Text**. Towards the bottom of the CMS page you just edited, but before the Web Author Console, you should find the **Header Text** box. Replace the words "Page Title" with the title you would like to appear at the top of the page.



2. Below the **Header Text** box, you should find the **Page Title** box. Here you enter the text you would like displayed at the very top of the internet browser window.



## Meta Tags

1. Meta tags provide information about a website to aid search engines in categorizing them correctly. Therefore, inserting meta tags into your website will allow search engines such as Google, to know the content of your website, so that your website will be listed in the results of searches. Without meta tags, your website **will not** be listed in results of internet searches.
2. For example, the ASK-IT Training website will be listed in the search results for the following terms: ASK-IT, Computer Training, USF Health, USF Health IT and Training Calendar, because these terms are listed in the web pages meta tags.

Meta Tags
<b>Meta Keywords:</b>
<input type="text"/>
<b>Meta Description:</b> Enter a list of keywords separated by commas
<input type="text" value="ASK-IT, Computer Training, USF Health, USF Health IT, Training Calendar"/>
<b>Meta Author:</b>
<input type="text"/>

3. In CMS, type in your words into the “Meta Description” text box. The list can be as long or short as you prefer.

## Previewing your website.

1. In the Web Author Console, you will find four links. The first is the Preview link.
2. Your website will open in a new browser window. In the preview, you will be able to click on the hyperlinks and attachments to ensure that they are working. When you finish examining the preview, close the window.

**NOTE: Hyperlinks and attachments will not work while in editing mode. To test them before saving them, you must preview the website.**

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## Saving Your Website

1. Now scroll down to the Web Author Console. Click Save and Exit.



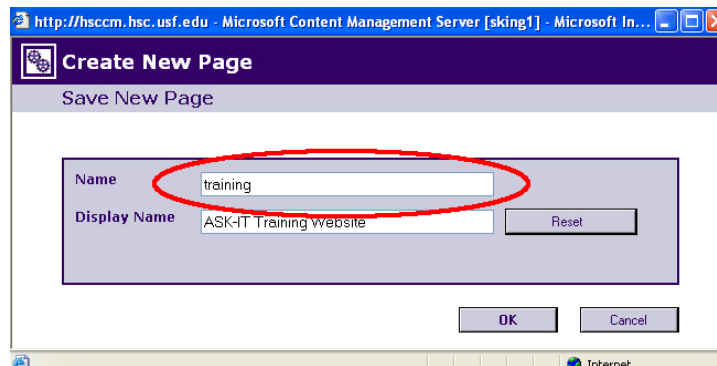
Page Status: **New**

[Preview](#)

[Save And Exit](#)

[Exit](#)

2. The Create New Page dialogue box will appear. For the "Name," type in what you would like the URL for that page to be. In this example, the URL would be health.usf.edu/is/training. For the "Display Name," type in a more descriptive name, as this field will only be seen by you, the web editor. Click "OK".



http://hscm.hsc.usf.edu - Microsoft Content Management Server [sking1] - Microsoft In...

### Create New Page

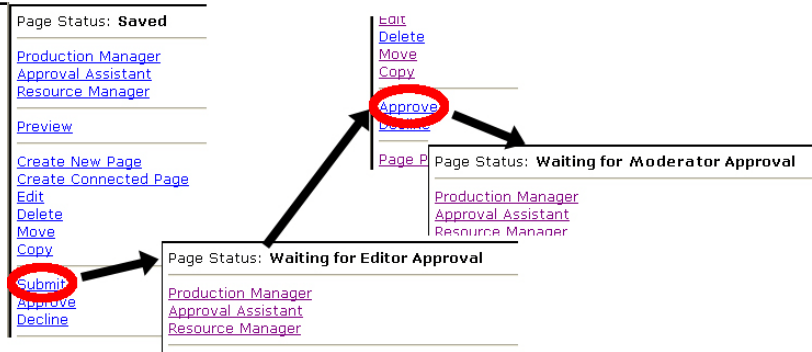
Save New Page

Name:

Display Name:

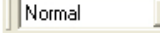
3. The screen will refresh itself. Scroll down to the Web Author Console. The Page Status should now be "Saved."
4. In the Web Editor Console, click on Submit. The screen will refresh itself again. Scroll back down to the Web Author Console again. The Page Status should now be "Waiting for Editor Approval." You are the Editor, so you must then approve your page by clicking on Approve.

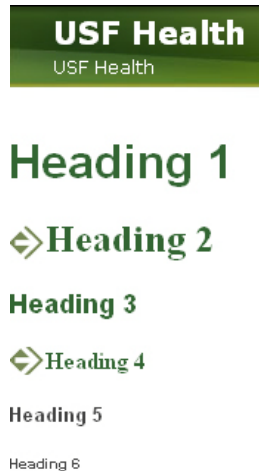
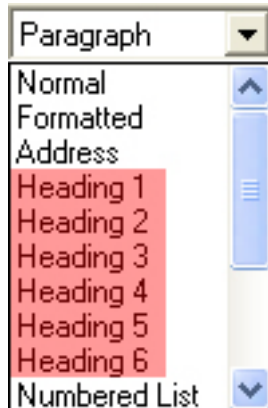
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Once the Page Status reads "Waiting for Moderator Approval," you have performed all the required steps to have the website you just created/edited appear on the USF Health website.

## Headings

1. In the Editing Menu, the first item in the top row on the left is the Style menu.  The default is "Normal."
2. There are six heading (1 main heading, and 5 subheadings). Each are slightly smaller than the previous.



3. To apply the headings, simply highlight the text of the heading, then select the level heading you would like to apply to it.

**NOTE:** The headings do not appear in the text editing box as they will appear on the website. To view the actual appearance of the heading, you must Preview the page.

4. Use the headings to maintain a uniform look throughout your websites.

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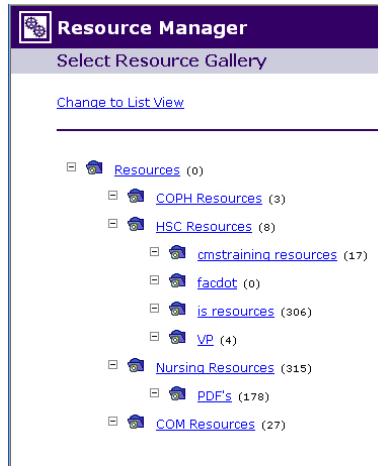
## Resource Galleries

The Resource Galleries exist to enable web editors to edit the content of their pages from any computer. By uploading files to the Resource Galleries, editors can access these files from any computer, as these resources would be accessible from any computer at all times.

1. To upload files to the Resource Galleries, find the Resource Manager link in the Web Author Console.



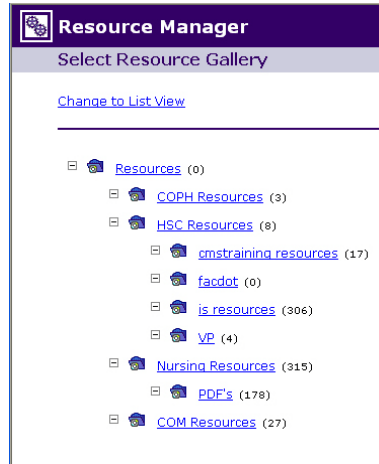
2. The Resource Manager will open up. There are two views, the Tree View and Thumbnail View. The Tree View is easier to work with.



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- The Resource Manager will open up. There are two views, the Tree View and Thumbnail View. The Tree View is easier to work with.

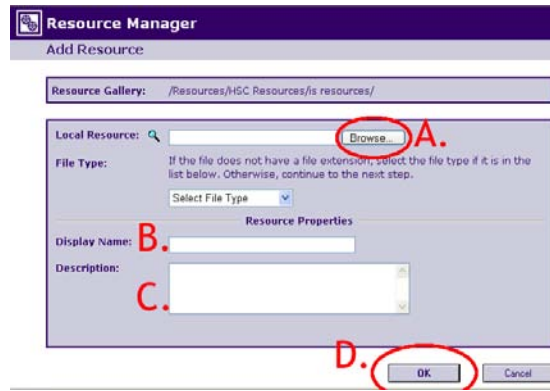


- The categories and subcategories are preset in CMS. Search in the tree until you find the category you would like to add your file to.

NOTE: Each web editor has permission to add files only to the category assigned to his/her website. If you do not have a pre-assigned category in the Resource Manager, contact [eleong@health.usf.edu](mailto:eleong@health.usf.edu).



5. Click the "Add New" button. The Add Resource dialogue box will appear.

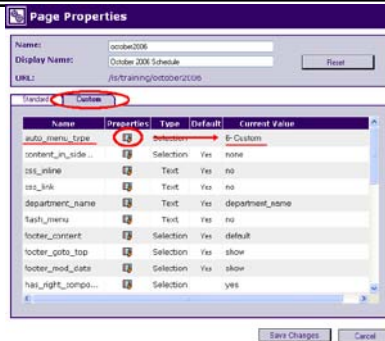


6. To add a resource follow these instructions: A) Browse your computer for the file, B) assign a Display Name to the file, this will be the name you see in the Resource list, C) you may, but you do not have to, add a brief description of the file, and D) click "OK."
7. The file will now be displayed in the Resource Gallery.

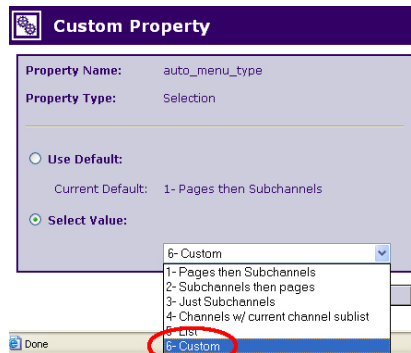
## Custom Left Menu

1. Creating a left menu (or any other additional component), is just like creating a new page. Start by clicking on the [Create New Page](#) link in the Web Author Console.
2. In the Template Gallery, click on the "Templates" category.
3. Select the "Left Custom Menu" option.
4. There are two styles, (please see the Right sidebar on this page) and four backgrounds for the left menu. You can choose from a green logo, a white logo, a tan design (listed as "none" in the menu) a solid tan background (listed as "blank" in the menu).
5. Once you have created your list of links (with or without bullets), each link must then be hyperlinked to its appropriate destination. (See Pg. 10 for more info on hyperlinks.)
6. Scroll down to the Web Author Console, and click [Save and Exit](#).
7. Both the "Name" and the "Display Name" must be "custommenu."
8. Now that you have created the left menu, you then must adjust the Page Properties for each website you would like the menu to be displayed on.
9. Select a website you want the menu to be displayed on.
10. Scroll down to the Web Author Console. Click on [Page Properties](#).  
**NOTE: If you do not see the [Page Properties](#) link, find the [Switch to Edit Site](#) link, then you should see the [Page Properties](#) link in the Web Author Console.**
11. At the top of the Page Properties dialogue box, click on the "Custom" tab.

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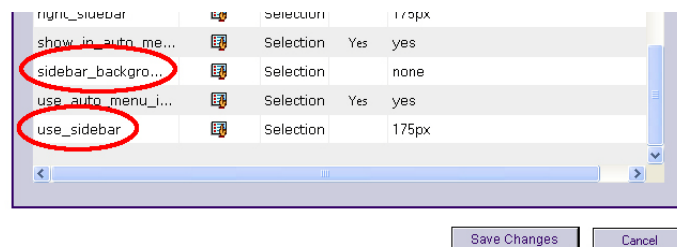


12. There are three properties which must be set. The first is the “auto\_menu\_type.” Click on the “Properties” icon, select the “Select Value” option, then choose “6-Custom.” Click “OK.”



13. You will then be redirected back to the Custom Properties dialogue box. Scroll to the bottom of the menu.

14. Set the “sidebar\_background” to whichever sidebar your prefer, however we highly recommend “none.” Then set the “use\_sidebar” to “175px.”



15. Again, these three settings must be set for every website you want the left menu to appear on.

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## Custom Right Menu

1. Creating a right menu, just like the left menu, is also just like creating a new page. Start by clicking on the [Create New Page](#) link in the Web Author Console.
2. In the Template Gallery, click on the "Templates" category.
3. Select the "Right Bar Component" option.
4. The Right Menu is not as sophisticated as the Left Menu. The links you insert into it will only appear as normal hyperlinks. Thus formatting in the Right Menu is the same for formatting a normal website. You can add hyperlinks, pictures, attachments, etc.
5. Once you are finished formatting the content, scroll down the page to the Web Author Console. Save the page. The "Name" and "Display Name" should both be "rightcomponent."
6. Also just like the left menu, Custom Page Properties must be set for each page you want the right menu to appear on.
7. Select a page you want the right menu to appear on. Scroll down to the Web Author Console. Click on [Page Properties](#).
8. In the Page Properties dialogue box, click the Custom tab at the top.
9. There are two Custom Properties which must be set. The first one, "has\_right\_component" must be set to "yes."
10. Then the "right\_sidebar" property must be set to "175px."

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## Editing an Existing Page

1. Navigate to the website you want to edit within CMS.
2. Don't forget to click the link [Switch to Edit Site](#).
3. In the Web Author Console, click the [Edit](#) link.
4. Edit the content of the website.
5. Once you are finished editing, click on the [Save and Exit](#).
6. The screen will refresh. In the Web Author Console, the "Page Status" should read "Saved."
7. Click the [Submit](#) link in the Web Author Console.
8. The page will refresh again, and now the "Page Status" should read "Waiting for Editor Approval."
9. Click the [Approve](#) link in the Web Author Console.
10. The newly edited websites are updated daily at 7am, 12pm, 5pm and 10pm.

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## Appendix A

*Terms:*

**Content Management Server (CMS)**- Microsoft IIS server side plug-in that is used to manage content and ease website publication.

**Web Author Console**- Center for all editing capability in CMS.

**Authors**- Authors have subscriber rights as well as the ability to create pages. Additionally, an author may edit or delete a page he has authored.

**Editors**- Editors have all the rights of authors with the additional rights of page approval and global editing of pages for a web site.

**Moderators**- Moderators manage channels. Their job is to approve postings and determine their length of publication.

**Resource Managers**- Resource Managers manage resource galleries and upkeep all resources stored for the website.

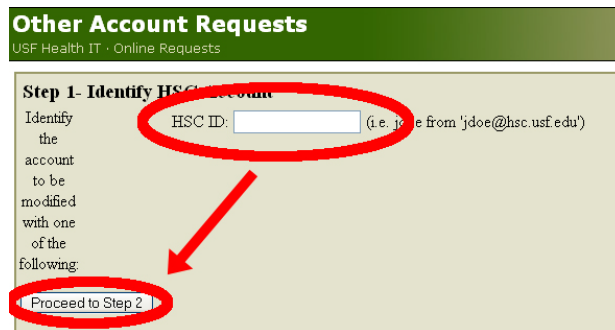
**Administrators**- Administrate the CMS. They are responsible for the creation and maintenance of user roles. They have global access to the entire system.

**Connected Pages**- Connected pages are two or more pages that use the same template, or that use templates from a set of connected templates, and that reference the same content source. Connected templates share a common set of placeholder definitions and custom properties

## Appendix B

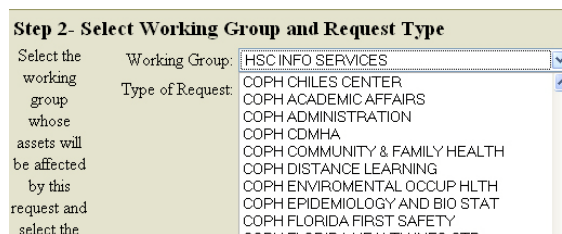
### How Do I Obtain Permission from HealthIS to Edit a Site?

1. To apply for this permission, visit the following website:  
[https://hscf.hsc.usf.edu/support\\_desk/accountmodification\\_screen.cfm](https://hscf.hsc.usf.edu/support_desk/accountmodification_screen.cfm)  
(Or visit [health.usf.edu](http://health.usf.edu), click on Services > USF Health IT > Change Account Permissions.)  
Enter your HSC ID in the text box, then click "Proceed to Step 2."



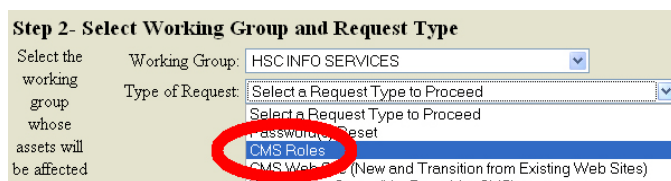
The screenshot shows the 'Other Account Requests' page with the title 'Step 1- Identify HSC Account'. It contains a text input field for 'HSC ID:' with a red circle around it and a red arrow pointing to a 'Proceed to Step 2' button, also circled in red. The text on the page reads: 'Identify the account to be modified with one of the following:'. Below the input field, it says '(i.e. jdoe from jdoe@hsc.usf.edu)'.

2. On the new screen, first select the "Working Group" for whom you will be editing websites.



The screenshot shows 'Step 2- Select Working Group and Request Type'. It has two dropdown menus: 'Working Group:' set to 'HSC INFO SERVICES' and 'Type of Request:' with a list of options including 'COPH CHILES CENTER', 'COPH ACADEMIC AFFAIRS', 'COPH ADMINISTRATION', 'COPH CDMHA', 'COPH COMMUNITY & FAMILY HEALTH', 'COPH DISTANCE LEARNING', 'COPH ENVIRONMENTAL OCCUP HLTH', 'COPH EPIDEMIOLOGY AND BIO STAT', and 'COPH FLORIDA FIRST SAFETY'.

3. Under "Type of Request" select CMS Roles. Then click the button "Proceed to Step 3."



This screenshot is similar to the previous one, but the 'Type of Request:' dropdown menu is open, and 'CMS Roles' is selected and highlighted with a red circle. Other options visible include 'Select a Request Type to Proceed', 'Password Reset', and 'CMS Web Site (New and Transition from Existing Web Sites)'.

4. On the new screen, click on the radio button under the column Add. Then click the "Submit Request" button.

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**Step 3- Enter Request Information**

Select how the HSC INFO SERVICES CMS roles for STACEY S KING will be modified. If the working group for which you are requesting has more than one web site or more than four groups for CMS roles, please clarify your request using the comments.

CMS Role	No Change	Add	Remove
Authors:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Editors:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Resource Managers:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Moderators:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments:

It usually takes the IT department 25-48hours to process the request.

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## Appendix C

### Creating Secure Websites

Within CMS, you have the ability to password protect some/all of your documents. If you choose to use this option, you can create websites that only those with HSC IDs can access. This is the total extent of password protection offered by Health IT.

### Uploading to the Secure Resource Gallery

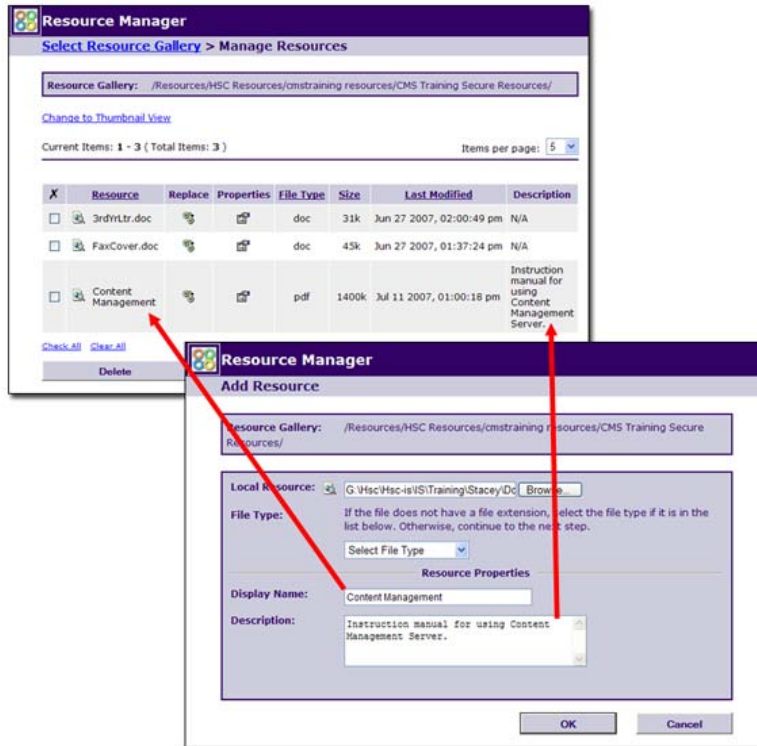
1. First, submit a ticket to Health IT requesting a secure area for your CMS website. The secure area and its corresponding secure resource gallery will be created by Health IT.
2. This process has two distinct stages. The first stage is to upload the documents you would like to be secured to your Secure Resource Gallery. You access this gallery in the very same way as outlined on pp. . The only exception being that you must upload the documents you would like to be secured to the *Secure Resource Gallery* which is different than your normal Resource Gallery.



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3. Once you have located the document you would like to upload, you do NOT need to "Select a File Type," but you do need to type in a Display Name, and a Description.



4. Once you have uploaded your documents in the Secure Resource Gallery, you will need to begin the second stage of this process, which is to create a secure website.

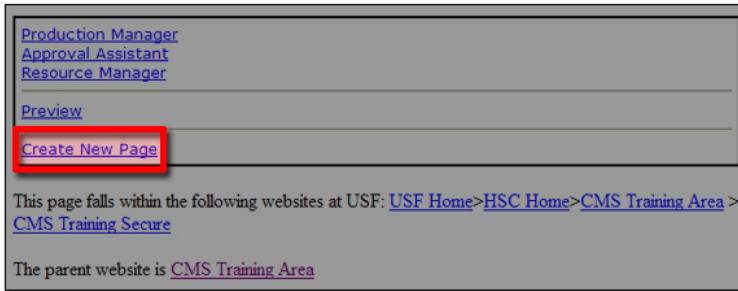
## Creating a Secure Website

5. Once you have requested to have the secure area created, it will appear in CMS as a sub website. Click on the link. You will then need to create a new page *within* the secure area. Therefore, all your secure documents must be attached the website(s) you create within the Secure sub website.

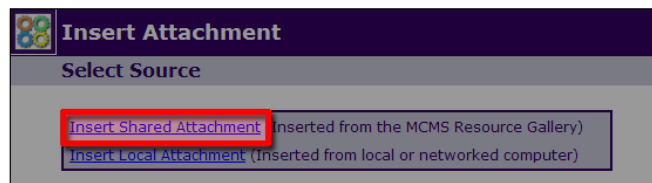
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6. You will then need to Create a New Page.



7. Follow the same steps to create a new page as outlined on pp. . You will then need to attach the secure documents to your secure website. Click on the Attachment icon in the toolbar. Then click on "Insert Shared Attachment."



8. Locate the desired document within the Secure Resource Gallery, and click the Select icon. Then type in Display Text and click Insert.

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**Insert Attachment**

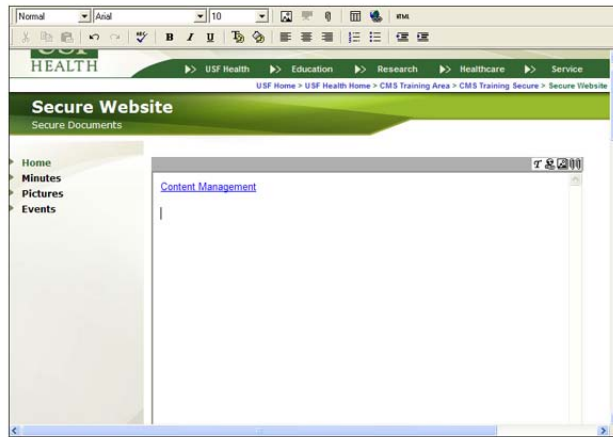
[Select Source](#) > [Select Resource Gallery](#) > [Select Attachment](#) > Insert Attachment

<b>Attachment Source:</b>	Shared Attachment
<b>Resource Gallery:</b>	/Resources/HSC Resources/cmstraining resources/CMS Training Secure Resources/
<b>Attachment Display Name:</b>	Content Management

<b>Display Text</b>
<input type="text" value="Content Management"/>

9. The document will then appear as a link the user can click on to download the file.



10. Once the site is Saved and Approved, you will need either to provide users with the URL of the secure site, or to post a link on a non-secure site for users to click on to access the secure website. When any visitor navigates to the secure site, he/she will be prompted to enter their HSC ID.

**Authentication Required**

Please ensure that cookies are enabled in your browser and try again.

Domain

User Name

Password