

# How to use the website content management system (CMS)

(Extended version)

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## How to log in to the website

- Type the following into your internet browser: <http://www.wokingham.gov.uk/login>
- Enter your website login. (You should have received this via email from the Website Team.)
- Hit the '**Login**' button

## How to format a page

When planning your web page remember to:

- Structure your page so that most important information is at the top of the page; least important information at the bottom
- Keep your web page as short as possible – using bullet points or attaching documents to the page are good ways to summarise information
- Use 'Plain English' – write in a way that's simple and easy to understand
- Include essential information only – don't write long introductory paragraphs
- Keep your sentences as short as possible – aim for a maximum of 10 words per sentence
- Avoid using acronyms and jargon. Use 'we', 'you', etc., instead of 'the council' and 'residents'
- When prompted for a template use the 'Tabbed content page' template

## How to add headings

Firstly, make sure that your page has an [H1] heading

- Clicking at the top of the page and type in the name of your page. (This large font heading is known as a H1 and is needed for accessibility and SEO)
- In the text box below the heading, type in a subheading that summarises the information in the first paragraph of your page
- Highlight subheading and select '**Header 2**' from the '**Style**' dropdown box
- Add page text underneath the subheading
- If you need to add any more text to your page, add another subheading underneath, using '**Header 2**' from the '**Style**' Dropdown' box again

## How to add website links (hyperlinks)

Links should be intuitive. For more information about hyperlinks see the website guidelines.

- Add a description of where you want your website link to go to, e.g., Visit the **Directgov website**. Highlight the words that you want to use as your link and click on the **'Create Link'** button

The **'Link Properties'** window will open:

- In the **'Link Type'** dropdown box, select **'External Link'** if your link is for an external website (ie: not part of the [www.wokingham.gov.uk](http://www.wokingham.gov.uk) website), or **'Internal Link'** if your link is for another page of our website
- **'URL'** should show the web address of your link. If the link is to another page on our website hit the 'Browse' button and click through the website pages, using the little crosses to the left of each section, until you find the page you want to link to. If you're linking to an external website, type in the website address, starting with **www**. Example: [www.bbc.co.uk](http://www.bbc.co.uk) You can also copy and paste in website addresses
- Leave 'Querystring' blank
- The Alternate Text should be the same text as you have used create the link on your page. Example: If you have highlighted the words 'Directgov website' on your page, you need to type in Directgov website in the Alternate Text
- Select **'Internal Link'** in the **'Class Name'** dropdown box if your link is for another page of our website. Select **'External Link'** if your link is for an external website
- Click **'OK'**

## How to add email links

Write out email addresses in full on your page. They will automatically become "mailto" links. Email links must be generic mailboxes not individuals.

## How to create a page

- Type the following into your internet browser: <http://www.wokingham.gov.uk/login>
- Enter your website login. (You should have received this via email from the Website Team.)
- **'Login' > 'Manage'** (at the top of the page, change from off to on)
- **'Explore'** (on left hand side)
- Browse to the section where you want to add your new page
- **'New'** button to create a new page
- Click on **'Tabbed content page'**

You will then be prompted to fill in some details about your page:

- **'Page Title'** should be a short sentence of about 3 to 7 words that explains what the page is about. This description will be the main link for search results. Acronyms must **not** be used
- **'Page summary'** should be a 1 or 2 sentence summary that describes what the page is about. This description will be displayed under the main link in the search results
- **'Link text'** will appear in the navigation panel on the right-hand side of the page. You should use only 1 to 4 intuitive words that are not acronyms
- The **'Meaningful URL'** is the text that will be shown at the end of the web address for the page. It will automatically default to be the same as the **Navigation Text** but all in lower case and with hyphens instead of spaces. Make sure to **keep in the hyphens between words**, as it will help when used in marketing material or used as a shortcut
- **Create Page as:** When you create a new page it will be created as a 'child page' by default. This means it will create a new page underneath the page you are currently on. If you want to put your new page on the same level as the page you're currently on, select 'Sibling of...'
- Hit **'Save'**
- You will be taken to your page in **'Draft'** format
- Add in your Page Title, at the very top of the page
- Click in the text box below the page title and add a sub-heading (that summarises what's in the first paragraph) then type in your text. (Read guidance **'2. How to format your page'** for advice on page format / structure.)

When you have finished your page, **'Save'** (Tip: hit the **'Save'** button every 10 minutes, to ensure that your work is saved. )

Your page will only be visible to you when you hit the **'Save and Publish'** button.

- Hit the **'Categories'** button. Click on **'Metadata'** (on the left) and hit the **'Save'** button.
- Click on **'Tags'**. Click in the **Subject.Keyword** field. Type in some keywords that people might use to find your page if they typed them into our search engine. Separate each word / phrase with a comma and a space. E.g. 'rubbish collection, collections, waste collection.'
- **'Save and Publish'**

Note: Your page will go through to the moderation queue, to be moderated by the Website Team, before it goes live on the website.

## How to update an existing page

- **Login:** <http://www.wokingham.gov.uk/login>
- **'Manage'** (at the top of the page, change from off to on)
- **'Explore'** (on left hand side) > **'Edit'**
- Update the text or documents as necessary
- Refer to section: **'2 How to format a page'**
- Hit the **'Save and Publish'** button. Your page will go through to the moderation queue

## How to delete a page

**Warning:** Any pages in the structure below the page you delete will also be deleted.

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on the **'Manage'** button (at the top of the page) so that it changes from **'Off'** to **'On'**
- Click on the **'Explore'** bar on the left. Browse to the page that you want to delete
- Click on the **'Page'** button
- Click the **'Delete'** button
- Click on **'Yes'** to delete your page

## How to add a document to the website

If you want to attach a document to a web page, it needs to be **saved in Asset Manager first**. Asset Manager is the storage library for all website documents and images.

If you've already saved your document in Asset Manager, move on to [How to add a document to a page.](#)

## How to add a document to Asset Manager

Before you add a document to Asset Manager, make sure that the file size is **no bigger than 2mb**. Ensure that your document is in **PDF format**.

- **Login:** <http://www.wokingham.gov.uk/login>
- **'Administration'** > Hover your mouse over **'Content'** > **'Assets'**
- **'Add'** > **'Please browse for a file..'** > **'Next'**

- Add a document title in the '**Title**' field. Title must be easy to understand. No acronyms or abbreviations
- In '**Alternate Text**' add your '**Title**' again
- In '**Short Description**' write a short document summary
- In '**Long Description**' write a long summary of what the document is about or copy and paste in, your '**Title**' again
- '**Save**'
- Click on the '**Categories**' tab (The folders, or '**Categories**', under '**Document Library**' in Asset Manager are named after the 2<sup>nd</sup> Level pages on the website.)
- Click on the cross to the left of the '**Document library**' folder. Then click on the folder that corresponds to the page you want to add your document to
- '**Save**'
- Click on the '**Advanced**' tab.
- In the '**Keywords**' field add the name of your document. Also type in any other keywords that might be used to find your document

Note: Separate words and phrases with a space and a comma, e.g.: 'statement of accounts for 2020, accounts 2020, accounts,' (This is for your benefit, so that if you need to update or delete the document later you can find it easily.)

- '**Save**'

## How to add a document to a page

Before you add a document to a page, you need to make sure that the document is saved in [Asset Manager](#) first.

If you are planning on adding 20+ documents to your page or planning to publish weekly/monthly documents to your page, the Web Team can set up an [Asset Browser](#) page for you.

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on the left-hand '**Explore**' bar
- Click on the page you want to add the document to > '**Edit**'
- Click in the section of the page where you'd like to add the document
- Type a sentence that describes the document, and add '(PDF document)' at the end, such as: 'Read our pothole repair schedule (PDF document)'
- Highlight the words with your mouse and click on the '**Link**' button

- Change **'Link type'** to **'Asset link'** and click on **'Select asset'**
- Click on the document you want to add to your page and click the **'Select'** button
- Change **'Class name'** to **'PDF'**
- **'OK'** > **'Submit'**

## How to add an updated document to a page

If you want to update a document on a web page, it needs to be **updated in Asset Manager first**.

Asset Manager is the storage library for all website documents and images.

## How to add an updated document to Asset Manager

- **Login:** <http://www.wokingham.gov.uk/login>
- **'Administration'** > **'Content'** > **'Assets'**
- Type in the name of your document in the **'Keywords'** box and **'Search'**  
or:
- Browse the **'Document library'** folders. Click on each category below **'Document Library'** to see all files
- Select your document > **'Edit'** > **'Please browse...'**

You can update the title of your document in **'Title'**. It should be an easy to understand title with no acronyms or abbreviations.

If you choose to update the title of your document, please update the other fields, as follows:

- In **'Alternate Text'** type, or copy and paste in, your **'Title'** again.
- In **'Short Description'** write a summary of what the document is about or copy and paste in, your **'Title'** again.
- In **'Long Description'** write a long summary of what the document is about or copy and paste in, your **'Title'** again.
- In **'Keywords'** copy and paste in your Title again and type in any other keywords that might be used to find your document.
- **'Publish'**

## How to add an updated document to a page

How to [add an updated document to Asset Manager](#) then:

- **Login:** <http://www.wokingham.gov.uk/login>

- Click on the left-hand **'Explore'** bar
- Click on the page you want to add the updated document to
- Click on the **'Edit'** button
- Highlight the link to the old document and press the delete button on your keyboard.
- Then type a sentence that describes the new document, and add '(PDF document)' at the end, such as: 'Read our pothole repair schedule for 2021 (PDF document)'
- Highlight the words with your mouse and click on the **'Link'** button
- Change **'Link type'** to **'Asset link'** and click on **'Select asset'**
- Click on the document you want to add to your page and click the **'Select'** button
- Change 'Class name' to **'PDF' > 'OK' > 'Submit'**

## How to remove a document from a page

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on the left-hand **'Explore'** bar
- Click on the page you want to remove the document from
- Press the **'Edit'** tab
- Highlight the link to the old document and press the delete button on your keyboard
- Click on the **'Submit'** button
- Once you've removed the document from the page, you should delete it from Asset Manager, if you don't need the document anymore.

## How to delete a document from Asset Manager

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on **'Administration'** (at the top)
- Hover your mouse over **'Content'** then click on **'Assets'**
- Type in the name of your document in the **'Keywords'** box > **'Search'**

or:

- Browsing through the **'Document library'** folders. If you click on each category below **'Document Library'** you can see all the files it contains

- Select the document by, ticking the box to the right of the document title.
- **'Delete' > 'Confirm delete'**

## How to use Asset Browser

If you are planning on adding 20+ documents to your page or planning to publish weekly/monthly documents to your page, the Web Team can set up an Asset Browser page for you. This is a simpler, quicker way of adding multiple documents to a page.

Asset browser examples:

<https://www.wokingham.gov.uk/council-and-meetings/open-data/plans-policies-and-strategies/>

<https://www.wokingham.gov.uk/roadworks-and-outdoor-maintenance/roadworks-and-road-maintenance/pothole-and-road-repairs-schedule/>

Please **contact the Website Team via Hornbill** if you would like us to set this up for you.

Once the Website Team have set up the Asset Browser folder (or folders) in Asset Manager, you start adding your documents to the page, as follows:

## How to add a document to an Asset Browser page

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on **'Administration'** (at the top)
- Hover your mouse over **'Content'** then click on **'Assets'**
- **'Add' > 'Please browse for a file..'** (Click where it says to attach your document)
- Click on the **'Next'** button.
- Add a document title in **'Title'** field. Easy to understand title with no acronyms or abbreviations.
- In **'Alternate Text'** type, or copy and paste in, your **'Title'** again.
- **'Short Description'** write a summary of what the document is about or copy and paste in, your **'Title'** again.
- **'Long Description'** write a long summary of what the document is about or copy and paste in, your **'Title'** again.
- **'Save'**.

- Click on the '**Categories**' tab (The folders, or '**Categories**', under '**Asset browser library**' in Asset Manager are named after the 2<sup>nd</sup> Level pages on the website)
- Click on the cross to the left of the '**Asset browser library**' folder. Browse through the folders, using the cross to the left of each folder. Click on the name of the folder that you want to save your document in.
- '**Save**'.
- Click on the '**Advanced**' tab.
- In the '**Keywords**' field type (or paste in) the name of your document. Also type in any other keywords that might be used to find your document.

Note: Separate words and phrases with a space and a comma, e.g.: 'statement of accounts for 2020, accounts 2020, accounts,' (This is for your benefit, so that if you need to update or delete the document later you can find it easily.)

- '**Save**'

## How to update a document on an Asset Browser page

Follow the steps in 'How to [add an updated document to Asset Manager](#)'.

## How to delete a document from an Asset Browser page

Follow the steps in 'How to [delete a document from Asset Manager](#)'.

## How to add an image to a page

### How to add an image to Asset Manager

If you want to attach an image to a web page, it needs to be **saved in Asset Manager first**. (Asset Manager is the storage library for all website documents and images.)

- **Login:** <http://www.wokingham.gov.uk/login>
- '**Administration**' > Hover your mouse over '**Content**' > '**Assets**'
- '**Add**' > '**Please browse for a file..**' > '**Next**'
- Add title in the '**Title**' field. Title must be easy to understand. No acronyms or abbreviations
- In '**Alternate Text**' describe your image (see alt text information in website guidelines)
- '**Save**'

- Click on the '**Categories**' tab (The folders, or '**Categories**', under '**image library**' in Asset Manager are named after the 2<sup>nd</sup> Level pages on the website.)
- Click on the cross to the left of the '**image library**' folder. Then click on the folder that corresponds to the page you want to add your document to
- Click on the '**Advanced**' tab.
- In the '**Keywords**' field add a description image. Also type in any other keywords that might be used to find your image
- '**Save**'

## How to add an image to a page

If you want to attach a document to a web page, it needs to be saved in [Asset Manager](#) first.

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on '**Explore**' and find your page > '**Edit**'
- '**Add / upload asset**' > '**Choose**'
- In pop up window, type the image name in the '**Keywords**' field > '**Search**' or
- Browse right-hand folders, underneath '**Image library**', and click on the cross next to folder
- Click on the image you want to add to your page. Another pop-up window will appear:
- '**Caption**': you can add a caption, which will be shown underneath your image when added to the page. Otherwise, delete the text where it says 'Caption' and no writing will appear underneath your image
- Select '**Original**' from the '**Display Size**' dropdown box.
- '**Save**' > '**Submit**'

Your image will appear on your web page once it has been moderated by the Website Team.

## How to replace an image on a page

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on '**Administration**' (at the top)
- '**Content**' then click on '**Assets**'
- Type the name of your image in the '**Keywords**' field and '**Search**' or

- ...or by browsing through the right-hand folders under '**Image Library**'.

The folders, or '**Categories**', under '**Image Library**' in Asset Manager are named after the 2<sup>nd</sup> Level pages on the website. If you click on the name of each folder underneath '**Image Library**' you will see all the images that are currently saved in that particular folder.

- When you've found the image you'd like to update, click on the name of it.
- Click on the '**Edit**' tab.
- Next to '**File**' click on '**Please browse...**' to attach your new, updated image.
- Leave 'Convert to PDF' un-ticked.

If necessary, you can update the description of your image where it says, '**Asset Title**'. It should be an easy-to-understand title with no acronyms or abbreviations.

- In '**Alternate Text**' add a clear description
- In '**Short Description**' write a summary of what your image is illustrating or copy and paste in, your '**Asset Title**' again.
- In '**Keywords**' type in any other keywords that might be used to find your image.
- Hit the '**Publish**' button.

## How to remove an image from a page

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on the '**Explore**' bar and browse to your page
- '**Edit**'
- Select image that you want to remove > '**Remove**' > '**Publish**'

Your image will be removed from your website page once it has been moderated by the Website Team.

Once you've removed an image from a page, delete it from Asset Manager.

## How to delete an image from Asset Manager

- **Login:** <http://www.wokingham.gov.uk/login>
- Click on '**Administration**'
- '**Content**' then click on '**Assets**'
- Search for the image that you want to delete by typing the name of your image in the Keywords field and hitting the '**Search**' button...

- ...or by browsing through the right-hand folders under **'Image Library'**.

The folders, or **'Categories'**, under **'Image Library'** in Asset Manager are named after the 2<sup>nd</sup> Level pages on the website. If you click on the name of each folder underneath **'Image Library'** you will see all the images that are currently saved in that particular folder.

- Tick the box next to the image you want to delete > **'Delete Selected'**

A warning message will appear:

Do not delete an image if it is attached to a page. (The number of pages an image is attached to shows under the 'Used' column.)

- Click on the **'Confirm Delete'** button

## How to move pages (relocating pages)

- **Login:** <http://www.wokingham.gov.uk/login>
- Browse to the page that you want to move.
- Click on the **'Options'** tab > **'Relocate'**
- Chose where you want to move your page to > **'Relocate page here'**
- **'Save and Publish'**

Your page will be moved to its new location once it has been moderated by the Website Team.

## How to re-order pages

You can choose the order in which the pages appear in the left-hand navigation list. Pages should be listed in alphabetical order, unless there is a particular reason why you want to re-order your pages (e.g. If you want to put your 'Contacts' page at the top of the list.)

To change the order that your pages appear in the left-hand list, use the **'Reorder'** button, by doing the following:

- **Login:** <http://www.wokingham.gov.uk/login>
- Browse to the page that you want to re-order.

Click on the **'Options'** tab > **'Reorder'**

- You will see your page shown in bold writing. With your mouse, **click on the name of your page** and **drag it** to where you want it to appear in the list.
- **'Save Page Order'**.

## How to access directories

- **Login:** <http://www.wokingham.gov.uk/login>
- **'Easysite Manager' > 'Modules' > 'Directory Builder'**
- Click on the name of the directory that you want to access.
- Click on **'Manage Directory Entries'**

This will take you into the directory, showing all the entries:

You can add, edit or delete entries from the directory, as follows:

### How to add an entry to a directory

- Scroll to the bottom of the page and click on **'Add New Entry'**
- Type the relevant information into all the fields and make selections from any dropdown boxes (Fields marked with red arrows show mandatory fields)
- **'Save'** (or **'Save and Add Another'** for multiple entries)

### How to edit an entry in a directory

- Click on **'Edit'**, to the right of the entry that you want to update.
- Update the details as necessary.
- **'Save'**

### How to delete an entry from a directory

- **Tick the box**, underneath the **'Delete' column**, to the right of the entry that you want to delete.
- Scroll down and click on **'Delete Selected.'**
- Click on **'Yes'** to confirm deletion of the entry.

## How to export entries from a directory

You can export all the entries of a directory into an Excel spreadsheet by doing the following:

- Scroll down to the bottom of the page and click on '**Export Records**'.
- Under '**Export Format**' tick the button marked '**ASCII CSV File**'.
- Under '**Date From**', click on the calendar symbol and select date that you want the directory entries to start from. *Use the dropdown boxes to select the month and year.*
- Under '**Date To**', click on the calendar symbol and click on the date that you want the directory entries to finish at. *Use the dropdown boxes to select the month and year.*
- '**Export**' > '**Download Now.**'

You can then open the document and/or save it.

## How to access responses to forms

The Website Team can create online forms which can be set up to go to a specific email address. Responses to these forms are also held in a Form Builder directory. To see all the responses to an online form, do the following:

- **Login:** <http://www.wokingham.gov.uk/login>
- '**Administration**' > '**Apps**' > '**Modules**' > '**Forms.**'
- Chose the form that you want to see the responses for.

To find your form: Click on the letter that the name of your form begins with, or type the name of the form into the search box (at the top, right)

- '**Options**' > '**Data Export**'.
- '**Export Format**' select '**ASCII CSV File**'.
- Under '**Date From**', click on the calendar symbol and click on the date that you want to view the responses from. *Use the dropdown boxes to select the month and year.*
- Under '**Date To**', click on the calendar symbol and click on the date that you want to view the responses to. *Use the dropdown boxes to select the month and year.*
- '**Export**'.
- Wait a couple of seconds. Click on '**Download now**'.
- The file will minimise at the bottom, left, of your screen. Click on it to open it.