



# Content management system (CMS) guide for editors

This guide is intended for content authors and editors working on the TfL website using the OpenText Web Site Management Server (RedDot) content management system (CMS). It provides an introduction to content management and covers the processes for creating and editing pages by building the structural components of a page and adding content using content modules.

## Audience

- Content owners and authors
- Content editors
- Project managers

## Requirements

### 1. Content management

- 1.1. Web content management involves creating, editing and publishing digital content for consumption via online channels. This can include text, images, or other document types
- 1.2. A web content management system (CMS) is a software system that allows users with little knowledge of web programming languages to create and manage website content with relative ease
- 1.3. In web content management, templates are used to standardise the content layout and simplify the creation and management process, as well as maintain a consistent user experience for end users
- 1.4. The CMS used for managing content on the TfL website is OpenText Web Site Management Server (also known as RedDot CMS)

1.5. In RedDot, project administrators build the structure, templates, workflows, and other components used to manage the site content. Content editors then use the templates to build the site content and use the workflows to review, approve and ultimately publish the content to the live web servers

## 2. Site structure

2.1 The TfL website is structured in multiple levels. The homepage is the first page that loads up when a visitor enters the site via the standard address ([www.tfl.gov.uk](http://www.tfl.gov.uk)). It contains teasers and promotions of the most prominent articles and functionality that are provided on the site

2.2 There are five main types of pages on the site. The table below lists them and provides a short description of each:

<b>Homepage</b>	The first page a visitor will see if entering the site via <a href="http://www.tfl.gov.uk">www.tfl.gov.uk</a> . This contains the most used functionality and promotions/teasers to the most relevant content
<b>Landing page</b>	A landing page is typically the first page in a top-level section of the site and contains an overview of the section, including teasers to some of the sub-section or content pages
<b>Section page</b>	Section pages are normally used to group several content pages together. They are normally connected to Landing pages but can be found linked directly from the homepage. Section pages also provide teasers to content pages and may contain a right hand navigation to link to all relevant child pages
<b>Standard content page</b>	A content page delivers text, images and documents to users. These pages may contain related content links and sibling and child navigation elements in the right hand column
<b>Visitor Tools</b>	These are pages that are either not managed by the CMS or are managed by the CMS but produce dynamic content when they are viewed in a browser. These include Journey Planner and live Status updates.

### 3. Navigation

3.1. Primary site navigation is split up into four key parts:

- The main navigation bar across the top, which provides four links to the most used pages and functionality
- The 'more' button in the top menu opens the second navigation area, where links to Travel information and Ways to get around are located
- The footer of each page contains the footer navigation
- The tool navigation right at the bottom of the page contains legal and compliance page links

3.2. In addition, to the main navigation, some pages may also have right hand navigation components which provide links to child/sibling pages

3.3. Breadcrumb navigation is present on all pages except the homepage and provides a straight line path of links between the homepage and the page being viewed

3.4. All of the above navigation components are produced automatically. Right hand navigation, however, needs to be enabled or disabled. This is done by enabling a page as the root of the navigation structure and then adding the navigation component to any child page that needs to display it

3.5. In SmartEdit, content editors are able to use the left hand navigation tree structure to navigate the site and find pages faster, in addition to using it to browse the site normally

### 4. Pages and Templates

4.1 Web pages are built using various templates. Each template has a role to play in the construction of a page. In the TfL RedDot project, templates fall into one of the following categories:

- **Base page template**

This is the foundation of a web page and contains most of the common components needed for a page to function. It connects to the stylesheets

and javascript files to enable the rest of the content to display correctly. It also provides the browser with basic information about the page, including the page metadata. There is only one base page in the TfL project

- **Layout templates**

These are added to the base page template to provide a layout and holding blocks (containers) for the rest of the content, as well as produce some of the common content components (eg breadcrumbs, page title)

- **Content modules**

These are usually small blocks of code that are added to the layout template containers and allow editors to populate the content placeholders they provide. Content modules are usually designed with a specific purpose and limited functionality in mind (eg a teaser component commonly provides a text field, an image and a link placeholder)

- **Widget modules**

These are similar to content modules, but instead of requiring editors to populate them, these modules dynamically gather and display content from various sources (databases, other websites, APIs etc)

- **Navigation components**

While most of the navigation elements on the site are produced automatically, there are instances where a navigation element needs to be added manually

4.2 A common page structure in the TfL project would look like the diagram below (4.3). Together, the templates produce the mark-up needed for the web page

Please note:

- Blue: Base page includes the header and footer components
- Green: The layout page provides the breadcrumb and the page title. Depending on the layout, containers are provided for content modules to be placed inside
- Yellow: Examples of content modules. These are the smallest content blocks that make up the page contents

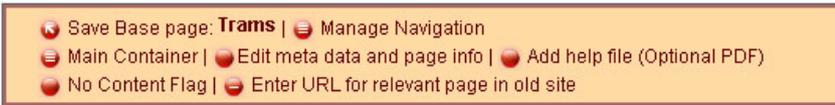
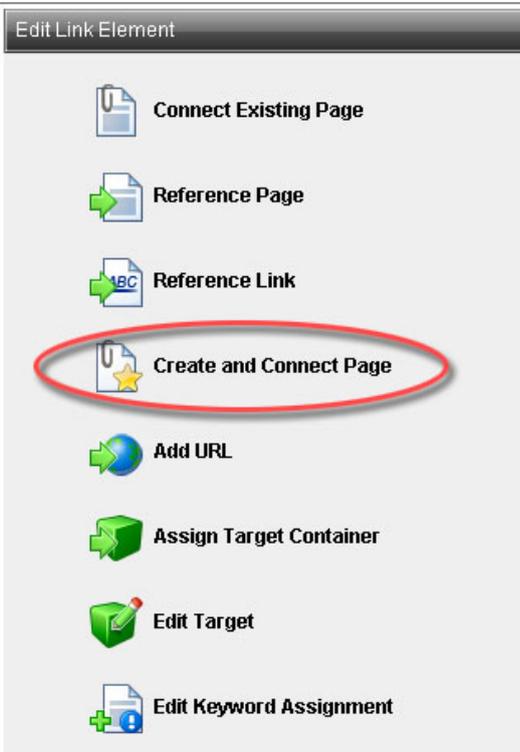
### 4.3 A common page structure in the TfL project

The screenshot displays the TfL 'Visiting London' page. At the top, there is a dark blue navigation bar with the TfL logo and links for 'Plan a journey', 'Status updates', 'Maps', 'Fares & payments', and 'More...'. A search bar is located on the right side of this bar. Below the navigation bar, the page has a light blue background with a 'Visiting London' breadcrumb and a large heading 'VISITING LONDON'. The main content area is divided into several sections: a large yellow banner for 'Buy a Visitor Oyster card', a 'PLAN A JOURNEY' sidebar with a form for 'From', 'To', and 'Leaving' time, and a 'Also on this site' section with a 'Coaches' link. Below these are several smaller content blocks: 'Barclays Cycle Hire', 'Emirates Air Line', 'Travel Information Centres', 'Getting to London', 'TfL Shop', and 'Related websites'. A 'Visitor guide' section includes a 'Welcome to London' PDF download link. The footer contains a list of links for 'Careers', 'Information for...' (Media, Boroughs, Freight, Taxis & private hire, Bus operators, Coach drivers), 'Business & commercial', 'Schools & young people', 'Urban planning & construction', 'Suppliers & contractors', and 'Open data users'. The footer also includes the 'MAYOR OF LONDON' logo, 'Terms & conditions', 'Privacy & cookies', 'Website accessibility', and 'Copyright TfL'.

## 5. Building a page

5.1 To create a page, first decide where your new page needs to go in the website hierarchy. Your new page will need to be connected as a child page to one on a level above it

5.2 To start building your new page, follow these steps:

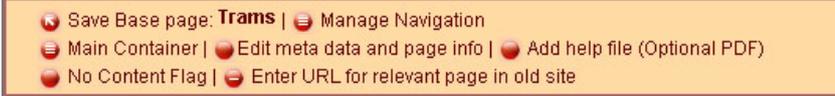
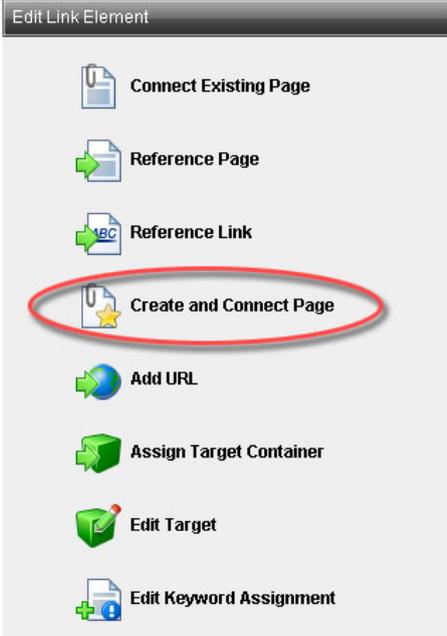
<p><b>Go to the existing page which will act as the parent for your new page</b></p>	<p>If you are creating a new section or a top-level page, then the Homepage would be your starting point.  <b>Note:</b> You can navigate around the site using the tree structure on the left</p>
<p><b>Open the base page for editing.</b></p>	
<p><b>Click on 'Manage Navigation'</b></p>	
<p><b>In the new window that appears, click 'Create and Connect Page'</b></p>	

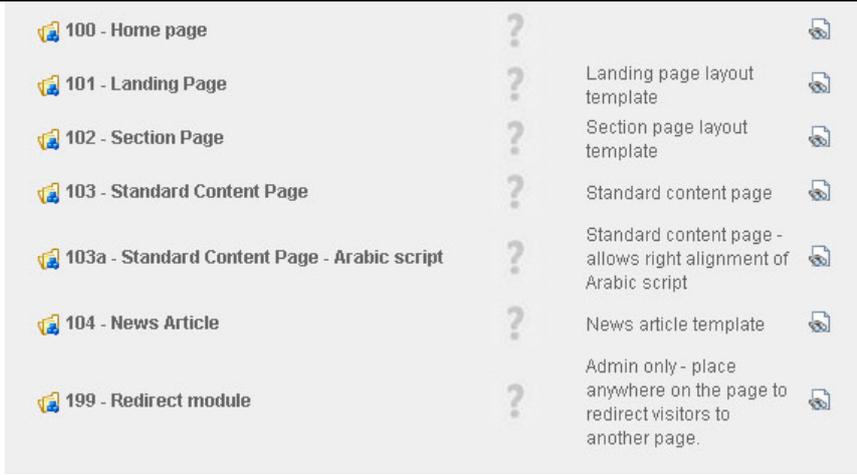
<p><b>Select the template or page definition you want to use to create your new page</b></p>	
<p><b>Give the new page a name and click OK</b></p>	<p>This will create the page (or pages, if you selected a page definition) and open the newly created page for editing</p>

## 6. Layout

6.1 If you chose just a base page in the previous step then the next step is to add a layout to your newly created page

6.2 To add a layout template to a base page, follow these steps:

<p><b>Open the base page for editing</b></p>	
<p><b>Click on Main Container</b></p>	
<p><b>In the new window that appears, click 'Create and Connect Page'</b></p>	

<p><b>Select the layout template you want to use for this page</b></p>	
<p><b>Give the new page a name and click OK</b></p>	<p>This will create the page and open the newly created page for editing</p>

6.3 The layout page provides the containers for the content modules to go into. The way these containers are laid out depends on the layout template selected, eg a Landing page layout template will have a main teaser at the top and two columns for teasers and links beneath. It will also have the right hand side column for additional information, related links and other content modules

## 7. Content modules

7.1. Now the base page and layout pages are in place, the next step is to create some content modules to display your content

7.2. Each content module has its own content elements. The process for adding a module to a container on a layout page is the same for all of them

7.3. To add a content module to a container on a layout page, follow these steps:

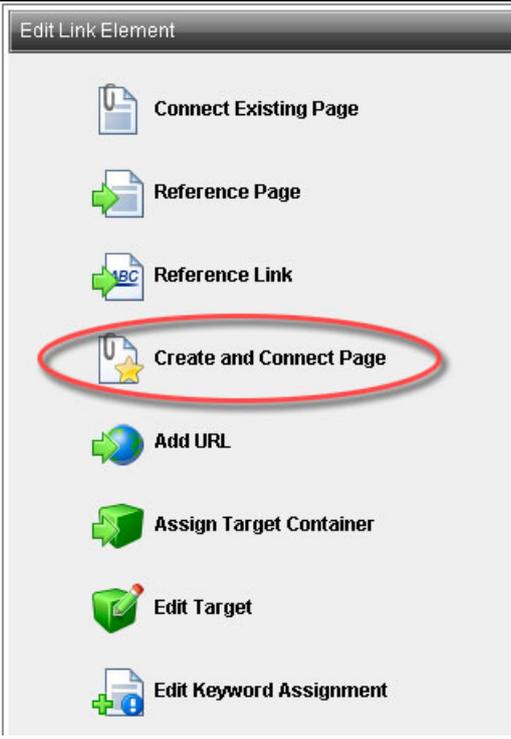
<p><b>Open the layout page for editing</b></p>	
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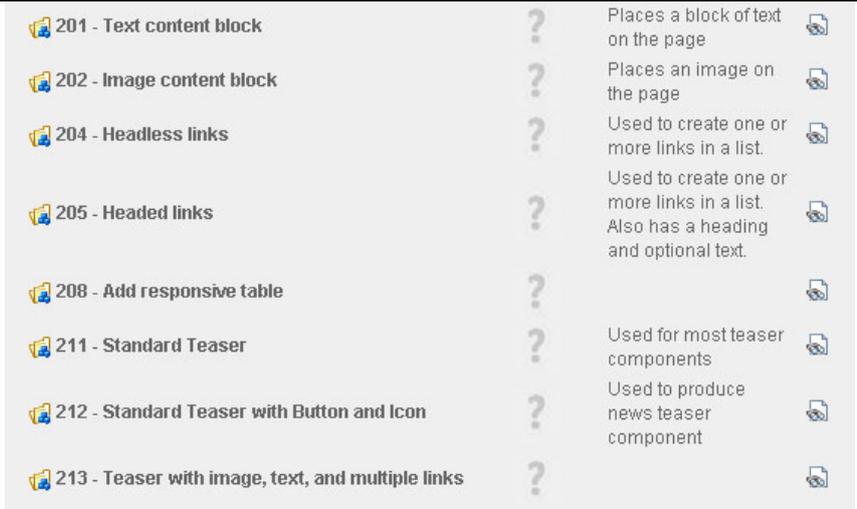
**On a standard content page, you can edit some content elements directly on the layout page. These include the page intro, page content and image**

If you want to add a module to one of the containers, click on the relevant red dot for that container and a new window will open with the options available to you



**When creating a new content module in the new window, select 'Create and Connect Page'**

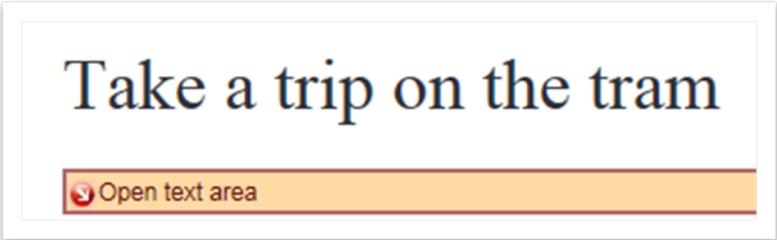
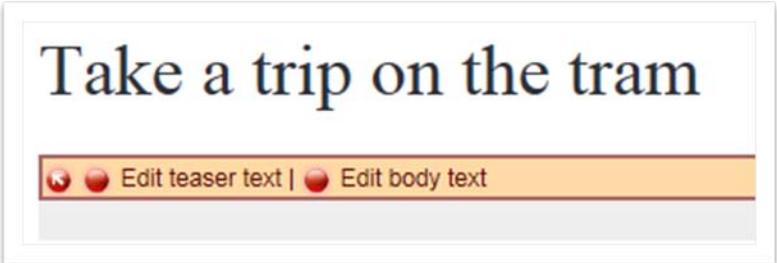


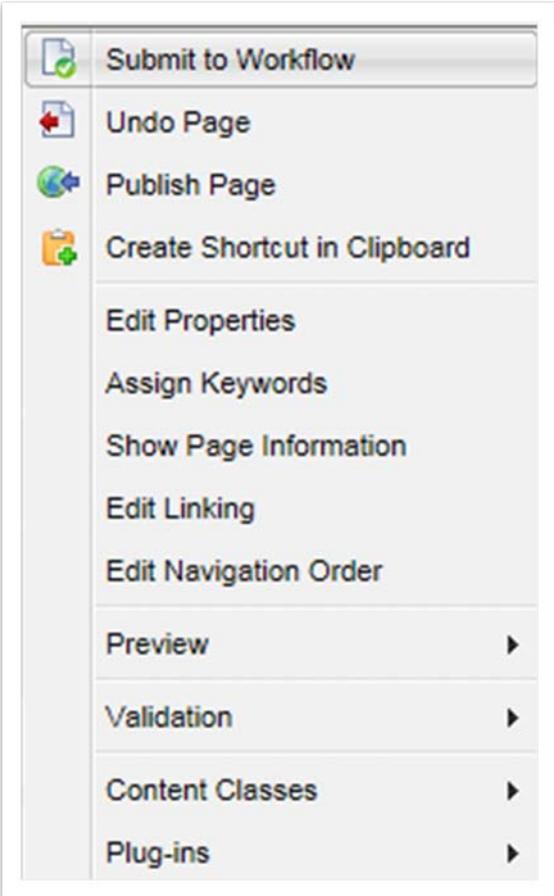
<p><b>Select the content module you want to use</b></p> <p><b>Note:</b> The choice of content modules will vary depending on which layout page and container you have selected</p>	
<p><b>Give the newly created module a name and Click OK</b></p>	<p>In some instances, the name you give to the module is actually used and displayed in the page so it is best to give the content module a descriptive name</p>
<p><b>The module will be created and opened for editing</b></p>	<p>You can now click on the relevant red dots to edit the content elements</p>

## 8. Entering or editing content

- 8.1. A newly created page will almost always need some content populated into its placeholders to become a useful part of the site. Mostly this applies to content modules. However, there may be some content elements (placeholders) on other types of pages, eg there are several page information placeholders that will require an editor's attention to provide accurate page information
- 8.2. In many instances, an editor will be required to edit existing content too. The process for creating and editing content is exactly the same.
- 8.3. To edit content on a page, follow the steps below:

<p><b>Click on the 'Open</b></p>	<p>A webpage in RedDot consists of many content pages, so</p>
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<p><b>Page' red dot for the page you want to edit</b></p>	<p>you need to make sure the 'Open Page' red dot you click opens the page you want to edit</p> 
<p><b>When the page opens, it will display other red dots. These relate to specific areas/elements on that page/module</b></p>	<p>Click the red dots one at a time to bring up the edit content window and edit the content of each placeholder. Some elements will require a short bit of text, others will be a full text field with formatting options and image or linking capabilities. Some options will be presented in lists and will require you to select from a drop down menu</p> 
<p><b>When you have finished editing an element, click OK at the bottom of its window</b></p>	<p>This will save the updated content and put the page into draft state under the editor's name. While a page is in draft for one editor, no other editor will be able to edit it as it will be locked</p>

<p><b>When the page is ready to be reviewed and published, the editor must submit it to the workflow. This can be done from the right click menu (available when the page is open for editing), or through the tasks tab in the top menu of the CMS</b></p>	
<p><b>When submitting a page to the workflow, the page gets published to the Staging server, where it can be previewed but is not available publicly</b></p> <p><b>If the page gets released from the workflow, it is then published to the live server. If the page is rejected, then the live server is not updated and the page reverts to draft state in the name of the original editor</b></p>	

**Undo page: This option will revert the page to the last released state, discarding all changes to all content elements/placeholders.**

**If a page has not been released since it was created, it is removed as if it was never created in the first place**

**Note: it will not go into the recycle bin**

## **Why we do this**

Designing and delivering content through a CMS like OpenText Web Site Management Server (RedDot) can improve the user experience and reduce costs by managing the publishing process in a consistent, repeatable way.

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**Owner:** TfL Online Compliance  
**Department:** TfL Online

**Version History**

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<b>Version</b>	<b>Date</b>	<b>Summary of changes</b>
1.0	19/11/2013	First issue

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**Review History**

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<b>Name</b>	<b>Title</b>	<b>Date</b>	<b>Comments</b>
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