End User
TERMINALFOUR 8.0

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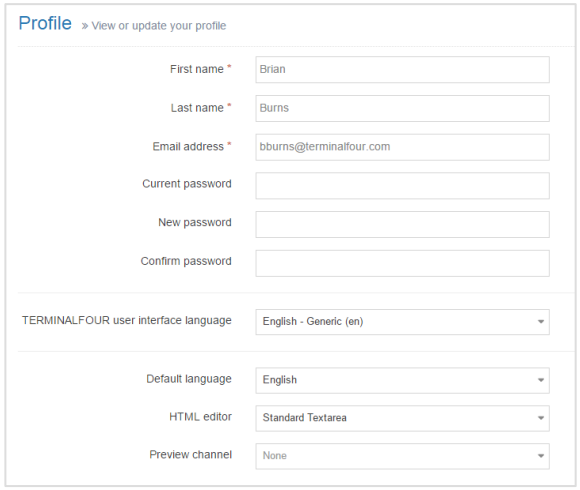
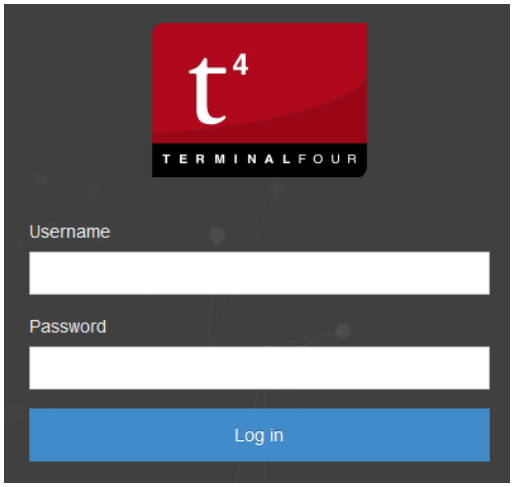
Contact: training@terminalfour.com

Objective

> Log in to TERMINALFOUR
> Open your user profile





Make a note of your URL:

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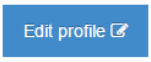
How to – log in



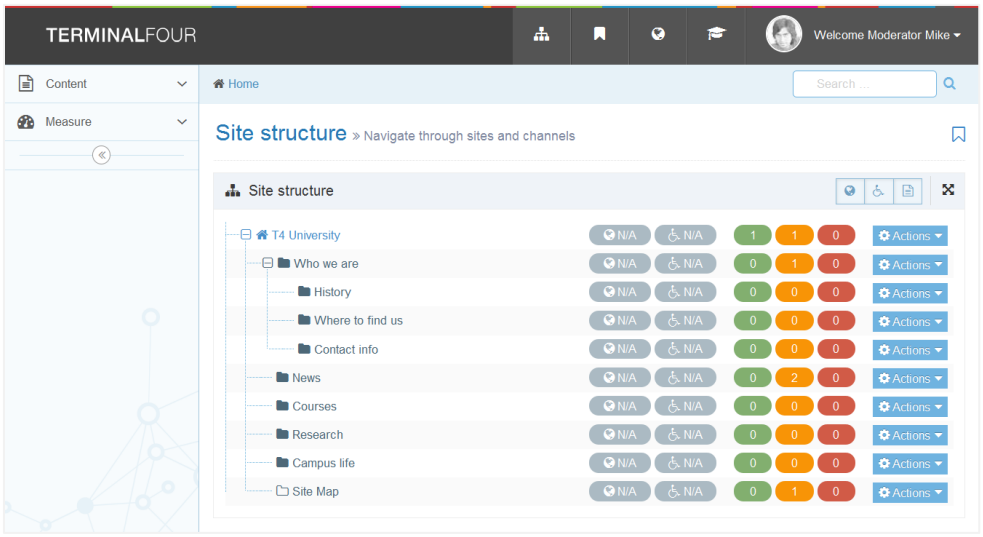
1. Open a web browser and navigate to your TERMINALFOUR installation.
2. Enter your username and password; then click Log in.
3. TERMINALFOUR opens. Click on your username in the top right corner to edit your user profile:

    a. You can update your email address; this is used for notifications sent from TERMINALFOUR.
    b. You can change your password.
    c. You can select your preferred user interface language. This is used to set the interface language of TERMINALFOUR; menu items, site structure and user options.
    d. If more than one language is available, you can change language. This will change the language of the site you work on when you log in.
    e. If more than one HTML editor is available, you can change editor. The default is TinyMCE.
    f. If more than one preview channel is available, you can set a default channel. This is used when you preview your content to see how it will look on the live site.

Build the Site Structure

Objective

- The first part of building a website is identifying at least the high level architecture. In TERMINALFOUR this involves building a Site Structure consisting of sections (folders).
- There are a variety of different types of sections. These are displayed with different folder symbols as displayed below.
- Once the different options have been explained by the trainer, build a small Site Structure you can use as a base for your new website.



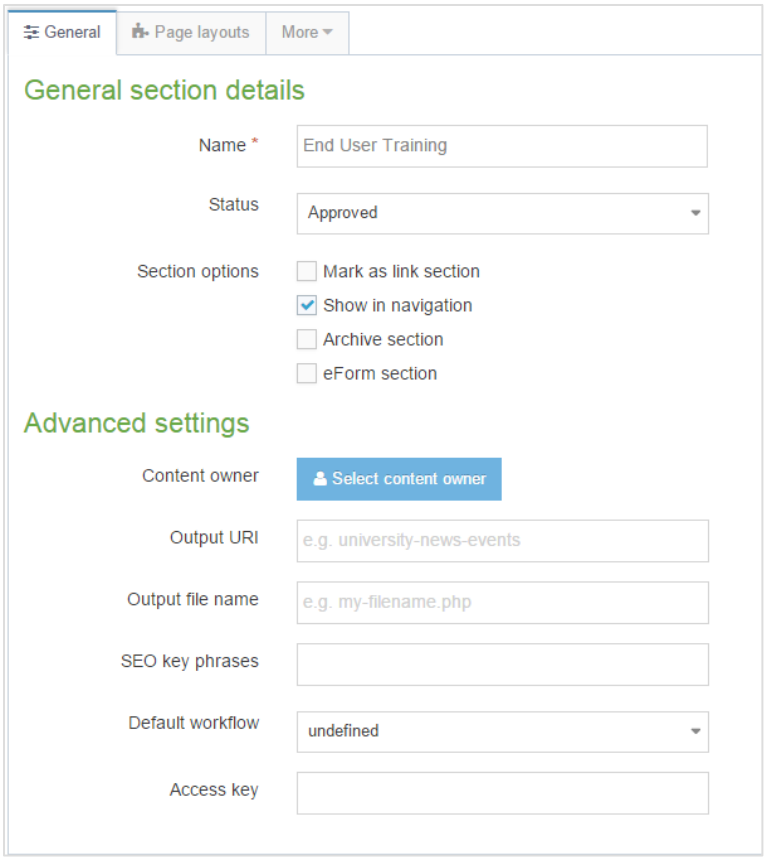
Section icons

- Root section (homepage of the website)
- Normal section
- Hidden section
- Pending section
- Inactive section
- Internal link section
- External link section
- Mirrored section

How to – add a section

1. If you are not already on the Site Structure screen, click the site structure icon.
2. At the level instructed by the trainer, add a new section with your name. To do so, click the actions menu and select create section. Actions
3. Enter the relevant information to create a section. At a minimum, the Name must be filled in. All other default options are explained on the next page.
4. Enter a name for the section and click save changes.
5. Repeat the steps above to build a site structure with at least three main sections. A minimum of one section should contain sub-sections as well.

Section information



When creating sections, the only required element is Name. The elements are all described below:

> Name: this is the name of your section and is typically also used directly in the menu navigation.

> Status: select Approved, Pending or Inactive. Approved sections will publish if they contain approved content. Pending sections will not publish. Inactive sections are marked for deletion and can be permanently deleted by an administrator.

> Section options: Check Mark as link section, if the web page is a link elsewhere; Show in navigation is checked by default- if unchecked, the section will not appear in navigation and will be displayed in the site structure with a clear folder icon; Archive section-- if content is no longer updated, a section can be set as an archive. This will save publish time, as the section will not be reviewed each time a publish is run. eForm section: check this box if eForms are going to submit to this section.

> Content owner: select the user who "owns" the section. Content in the section will inherit this ownership, unless a different owner is specified for the content.

> Output URI: lets you specify the Uniform Resource Identifier (URI) as the destination of the new section. If this field is left blank, the section's name is used when publishing.

> Output file name: enables you to specify a file name. If left blank, the default file name set in the channel is used. This can be used in conjunction with the Output URI in three possible ways (parent = section parent folder, currentsectionname = current section name, outputuri = current section output uri, filename.html= the new file name in the current section):

i. and Output File Name results in a published page as follows: **parent/outputuri/filename.html**.
ii. Output File Name results in a published page as follows: **parent/filename.html**.
iii. Output File Name but with a name which is the same as the channel index name (in this case filename.html) results in the following: **parent/currentsectionname/filename.html**.

> SEO key phrases: Enter comma separated key phrases and/or words. Make sure these match the content!

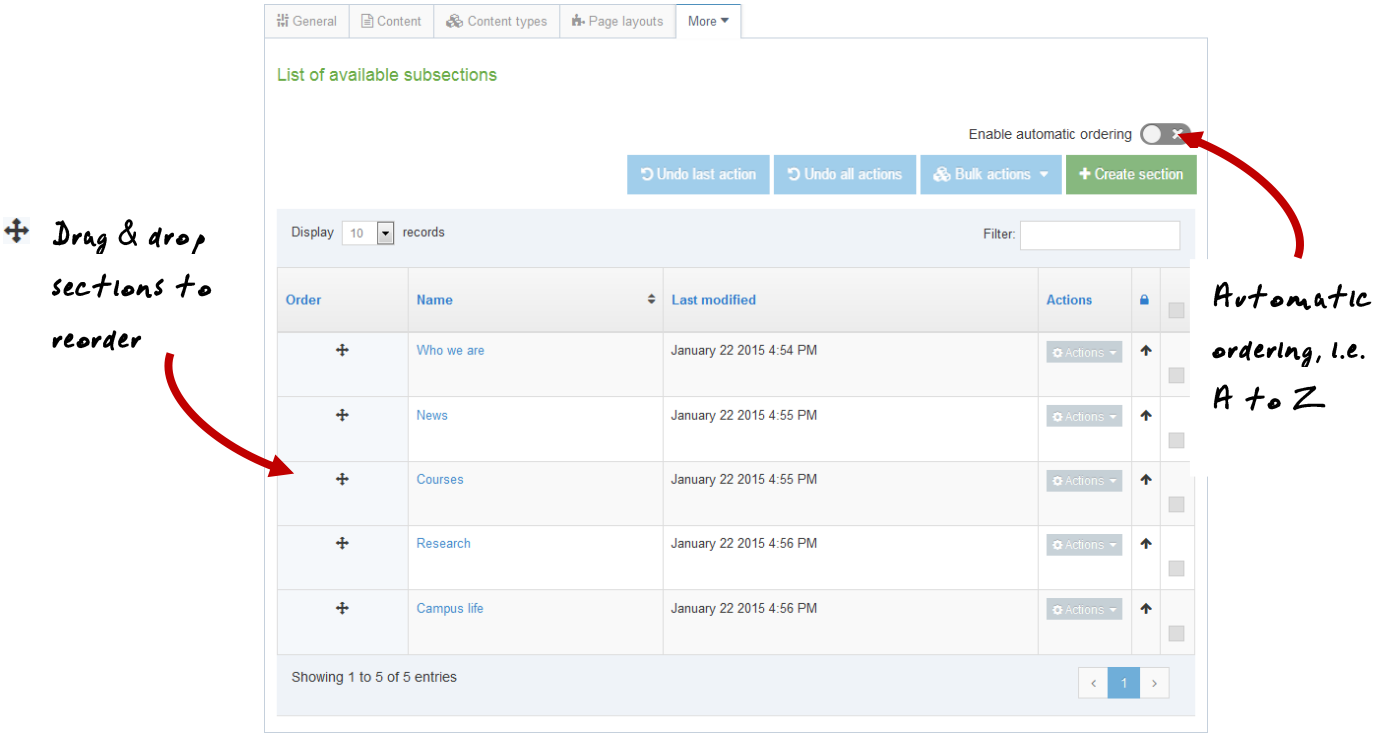
> Default Workflow: select the workflow you wish to use for all content added to this section/branch.

> Access key: lets you enter a single character, which may be used as a shortcut within a navigation menu. Allows a computer user to immediately jump to a specific part of a web page via the keyboard.

Move and reorder sections

Objective

> Sections can easily be moved, and the order in which they appear in navigation will change to reflect this.
> Move one of your sections, using the drag and drop method.
> Reorder the sub-sections you created earlier. Use either automatic ordering or move them manually.



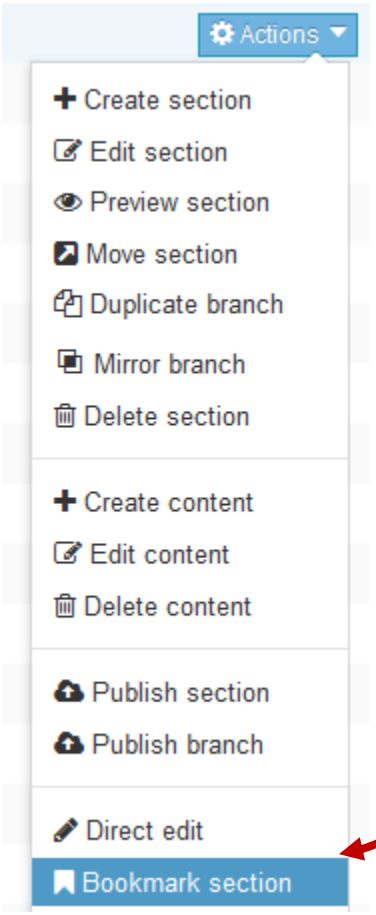
How to – move and reorder sections

1. To **move** a section, drag it with your mouse and drop it to the new location.
2. Click confirm to save the change to the site structure.

1. To **reorder** sections, click the site structure icon.
2. From the actions menu Actions select edit section.
   a. Select the more tab → subsections
   b. If you wish to use automatic ordering, slide the box to the check position and select a method. By default, all sections are locked. Unlock the sections you wish to apply automatic ordering to. To do this, use the unlock option in the actions menu.
   c. If you wish to manually move the sections, use the move arrows to move sections around.
   d. Click save changes before navigating away from this screen, as the changes will otherwise not be saved.

Objective

> The bookmark tool allows you to add your favorite sections to a bookmark list.
> Bookmark one of your sections.



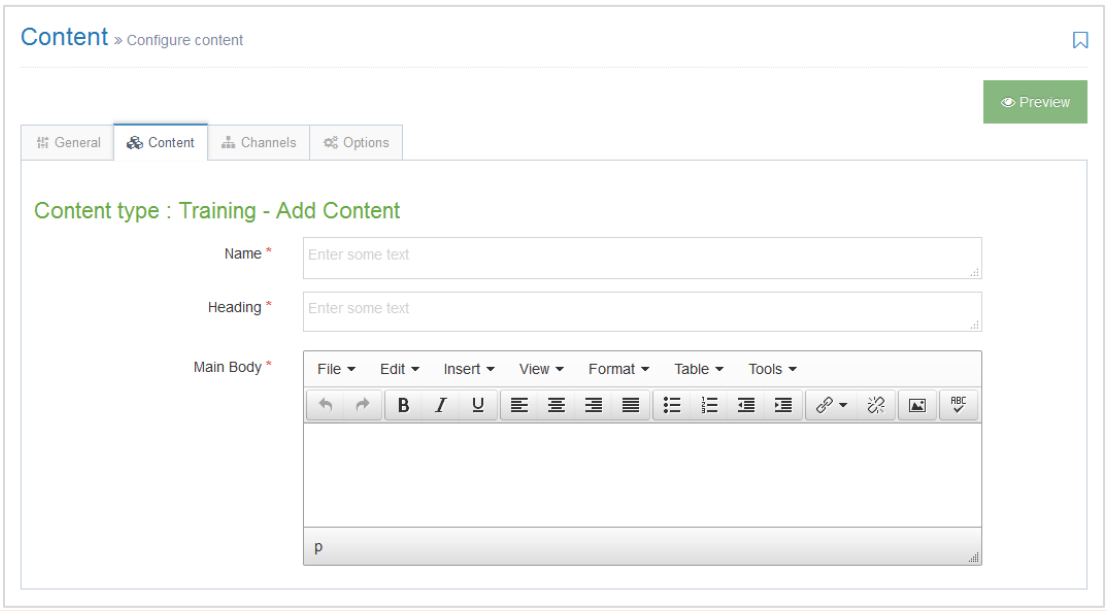
How to – bookmark sections

1. Select bookmark section from the actions menu Actions beside the section you wish to bookmark.
2. Check the bookmarks tool to see that your section has been added as a bookmark.
3. Areas of TERMINALFOUR can also be bookmarked, by clicking on located towards the top right-hand-side of the screen.

Add content

Objective

> Content is added to a section by using Content Types.
> Add content to one of your sections using the generic content type (the trainer will point out the name).
> Preview the content to ensure it looks OK.
> Add the content or save as draft.



Name of your generic Content Type

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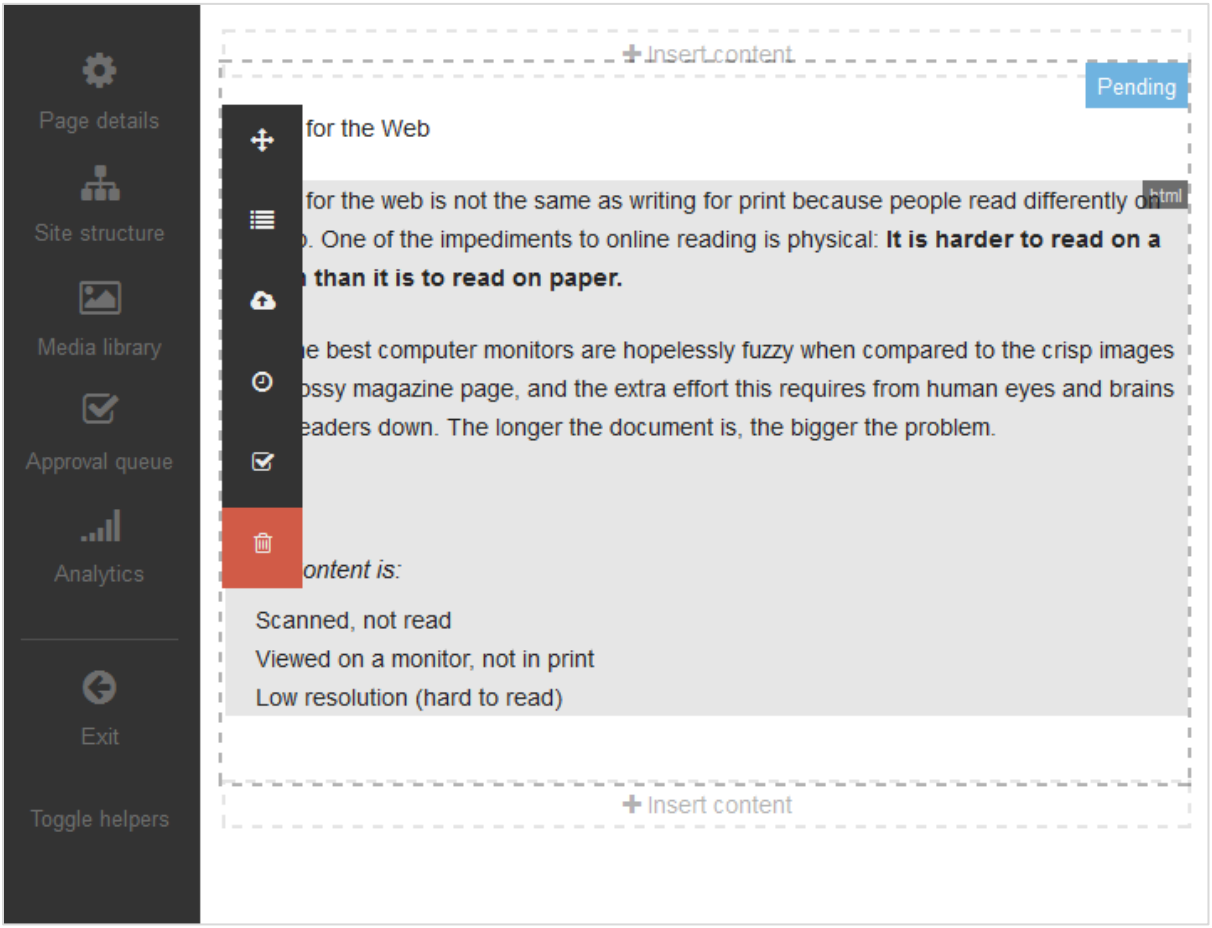
How to – add content

1. Select create content from the actions menu beside the section you wish to add content to.
2. If only one content type is enabled, this will open straight away. Alternatively you need to select the content type you want to use.
   a. The * next to the element identifies that the element is required.
3. Enter a name for the content. This will not be displayed on the published page, but simply act as a name within TERMINALFOUR.
4. Use the Word file "Writing for the Web" and create a piece of content which looks as similar as possible to the original.
   a. Open the Word file given to you by the trainer and copy the text.
   b. Paste the text into the main body of your content. Some formatting may be necessary.
5. Preview to ensure you are happy with the result.
6. Click save changes to save the content once complete, or expand your options by clicking on the icon next to save changes to reveal options such as save & approve and save as draft. The drop-down menu options may vary depending on configuration.

Objective

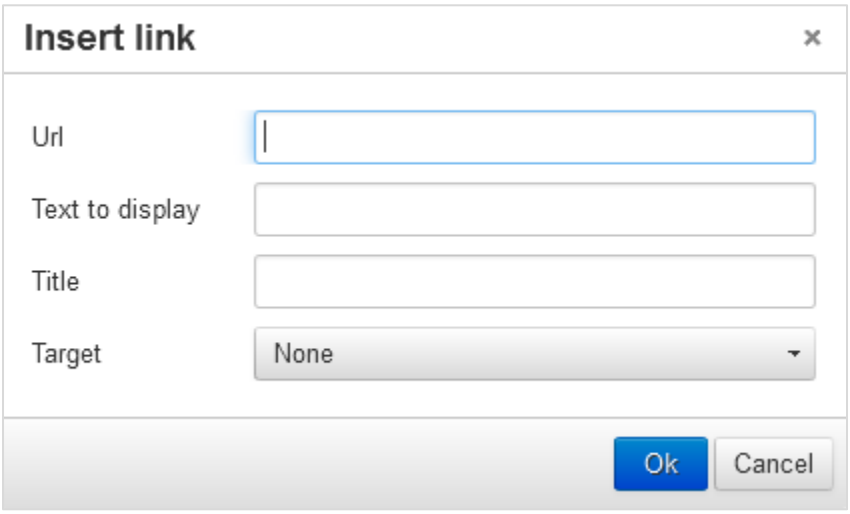
- There are numerous ways to add and modify content in TERMINALFOUR. This time we are going to use Direct Edit to add a new piece of content, with internal and external links.
- Open Direct Edit and add a new piece of content on the same page you added the "Writing for the Web" content to.
- Include a link to an external website (e.g. http://www.terminalfour.com), a link to one of your other sections (e.g. "News") and a link to another attendee's "Writing for the Web" content.
- Create an anchor link navigating from the bottom of the content back to the top.



How To – add links

1. From the Site Structure screen, select Direct Edit from the Actions menu beside the section you just added content to.
2. A Direct Edit screen opens with dotted line surrounding any content for which you have editing rights. A Direct Edit menu is displayed to the left of the screen.
3. Click Insert content to begin adding new content to the page.
4. Select a Content Type.
5. Enter a Name for your content – we will now create a number of links.

Continues >>



How to - continued

6. **External Link**: e.g. http://www.terminalfour.com.
   a. Type the text you wish to use as your link text; e.g. TERMINALFOUR.
   b. Highlight the text; then select Insert external link from the WYSIWYG.
   c. The Insert/Edit Link Window opens; complete the details as required.
      i. URL: enter the URL of the site you wish to link to.
      ii. Text to display: enter the link text here.
      iii. Title: enter information about where the link will send the user; this will aid user accessibility.
      iv. Target: select how the link should open, e.g. within the same window or in a new window.

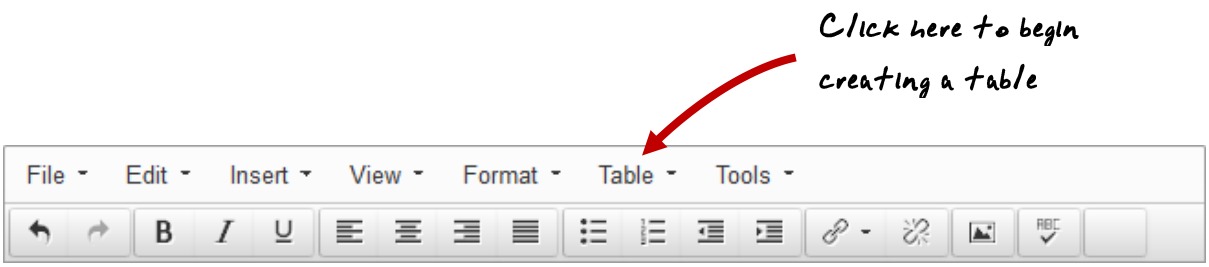
7. **Section Link**: e.g. to one of your other sections.
   a. Type and highlight the text you wish to use as the link text or simply place your mouse where you want the link inserted. Select Insert Section Link from the WYSIWYG.
   b. A window will pop up displaying the Site Structure; navigate to the section you wish to link to and click on it.

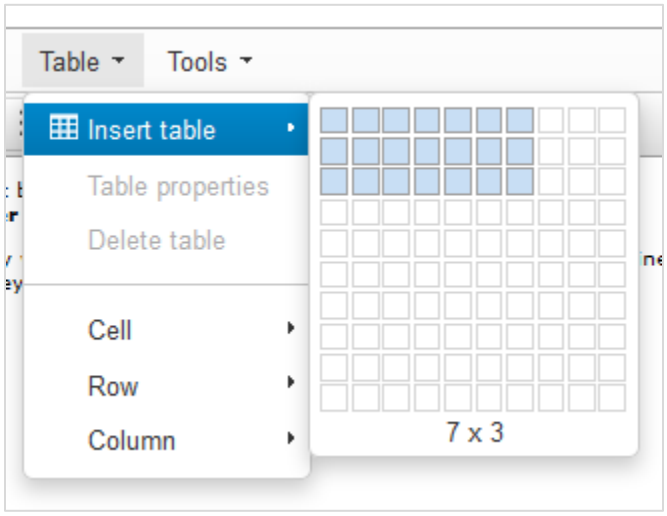
8. **Content Link**: e.g. to another attendee's "Writing for the Web" content.
   a. Type and highlight the text you wish to use as the link text or simply place your mouse where you want the link inserted. Select Insert Content Link from the WYSIWYG.
   b. A window will pop up displaying the Site Structure; click on the section that contains the content you wish to link to; a list of content will be displayed.

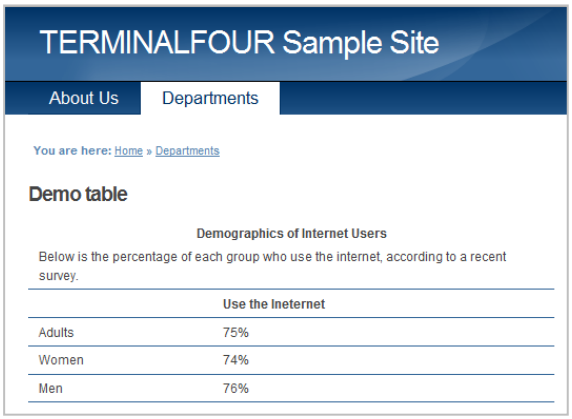
9. Click Save changes to save the content once complete.
10. Preview your content to test your links.

Objective

- Tables are sometimes used to arrange information within your content to make it easier to read.
- Create a piece of content in one of your empty sections.
- Create a table similar to the one below.





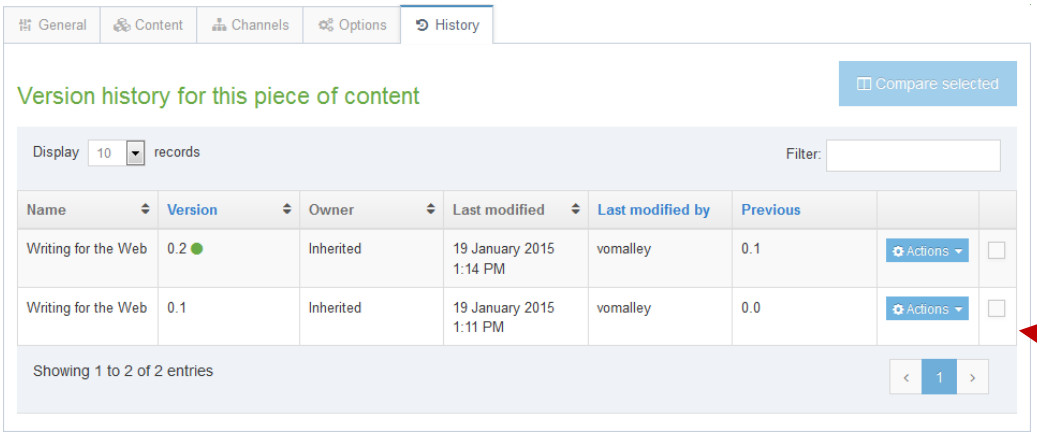


How to – create tables

1. From the Site Structure screen, select Create content from the Actions menu beside the section you wish to add content to.
2. If only one content type is enabled, this will open straight away. Alternatively you need to select which content type you wish to use.
3. Enter a Name for the content. This will not be displayed on the published page, but simply act as a name within TERMINALFOUR.
4. In the Main body, click Table from the WYSIWYG and create a table.
5. When finished, click Save changes to save your work.

Objective

- TERMINALFOUR allows you to see all changes made to content, compare different versions and set previous versions of the content live.
- To see how this works, modify a piece of content; then compare the two versions of the content.
- Set the original version of the content live again.



Select two versions of content and click Compare selected

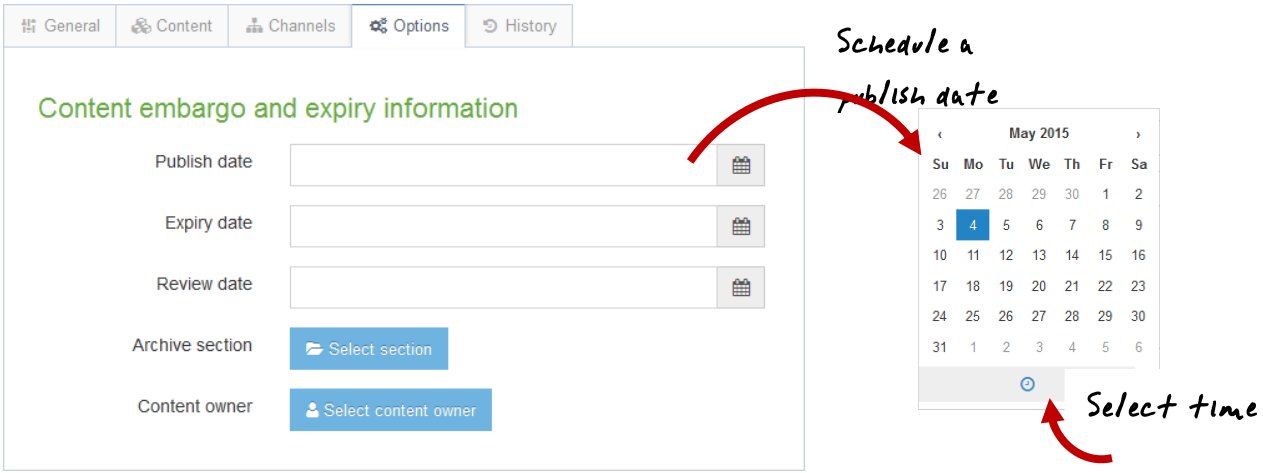
Elements where changes have occurred are highlighted in yellow

How to – history and versions

1. Modify a piece of content.
   a. Select Edit content from the Actions menu beside the section containing the content.
   b. Click on the content's name to open it.
   c. Make changes to the content and click Save changes.
2. Select History from the content's Actions menu beside the content.
3. Check the two versions of content you wish to compare and click Compare selected.
4. A side-by-side comparison of your content is displayed (see image above). Changed content is highlighted in yellow.
5. Click Back to return to the History screen.
6. Select Make current beside the original version (assuming you wish to revert to a previous version of the content).

Objective

- Once content is approved, it will automatically be published the next time a publish is run, unless you specify a publish date.
- Specify the Publish Date, Expiry Date, Content Owner and Archive Section for one of your pieces of content.
- You can use the normal view or Direct Edit.



How to – content options

1. From the Site Structure screen, select Edit content from the Actions menu beside a section containing content.
2. Click on the content's name to open it.
3. Select the Options tab.
4. Fill in the relevant fields by clicking the box to open the calendar; simply click on the date you wish to use and adjust the time by dragging the hours and minutes, then click Done. If you do not set the time, it will default to the current time.
5. Click Save changes to save the content options selected.

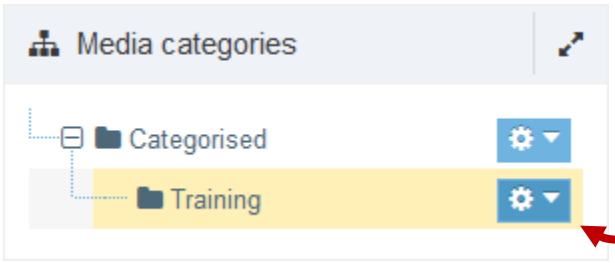
Content options

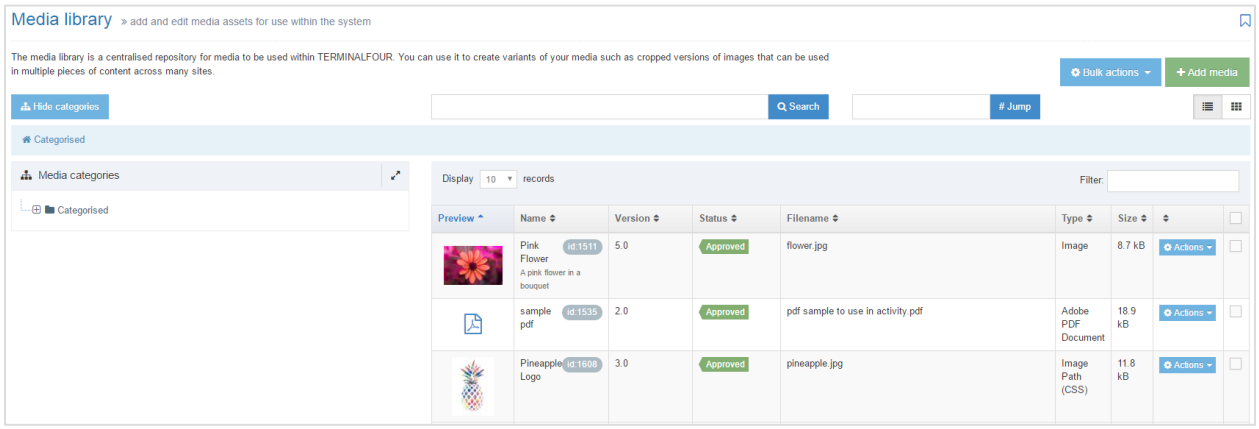
- **Publish Date**: schedules a publish date, i.e. the date the content will go live on the site. The content has to be approved before it can be published.
- **Expiry Date**: content will expire and be removed from the site.
- **Review Date**: TERMINALFOUR Site Manager will email the Content Owner. If no owner is set, the person who last modified the content will be notified instead.
- **Archive Section**: allows you to specify a section for the content to go to once it has expired. If you are publishing lots of content, it may be a good idea to create an Archive Section to store expired content in. This way the content can be used and published again at a later date. Click Select section to select a section; the section id is inserted as a reference.
- **Content Owner:** sets an owner to the Content Item. If this is not set and the Section Owner is set, this will be used.

Media Library

Objective

> The Media Library is used to store files of all sorts to use in content. You may not have access to uploading new files – this depends on your user credentials.
> Open the Media Library and locate the training category.
> Add a category with your own name; then upload the image you have been given by the trainer.





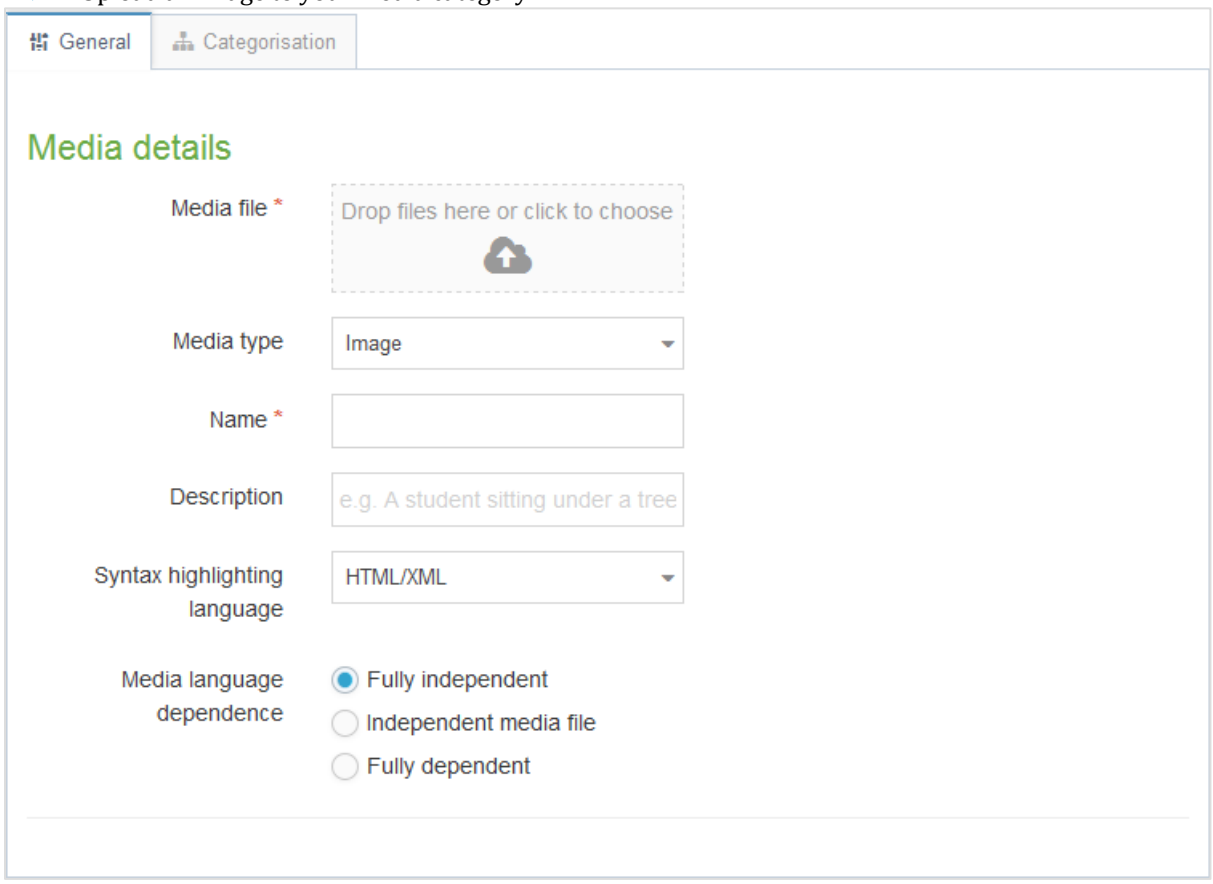
How to – add a media category

1. To add a Category, go to Content and select Media library.
2. The Media Library opens.
3. Expand the tree structure to find the "Training" category and click on the actions menu
4. Click Create sub-category.
5. Enter your new category name and click save changes.
6. Click on your new category.

Objective

+ Add media

> Upload an image to your media category.



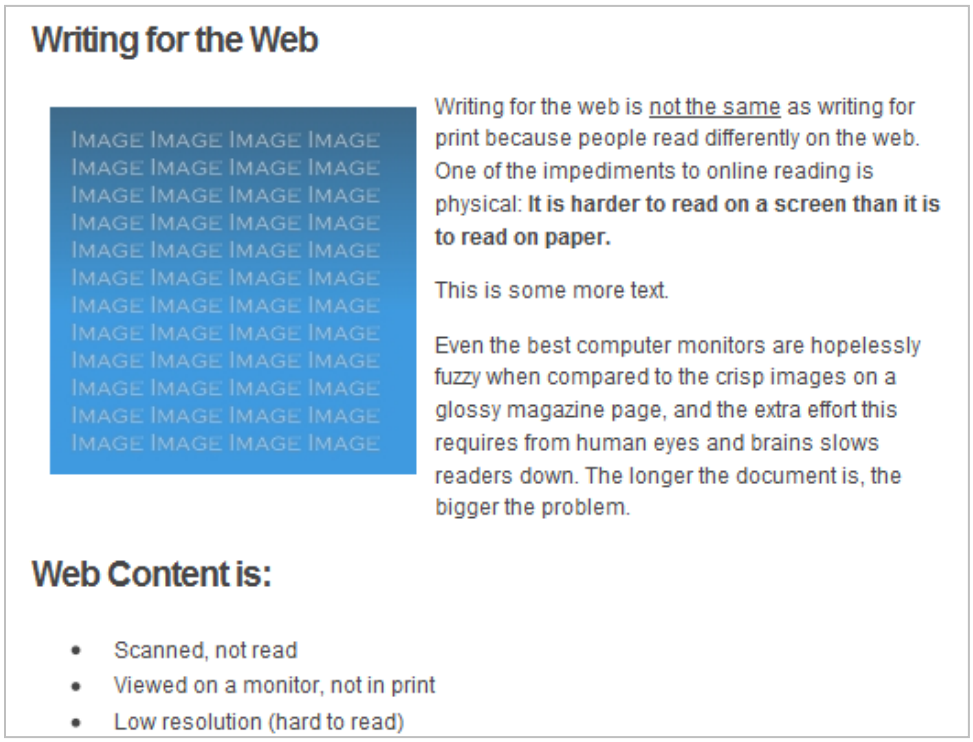
How to – add media

1. To add media to your category, click Add media (the use of **Name** and **Description** is dependent on your Media Layouts):
   a. Media file: click to select the relevant image.
   b. Media type: this will be automatically detected where possible. If an incorrect type is selected, select the media type from the list.
   c. Name: enter a name for your Image. By default, this is not output on the site, but is used only as a name in the Media Library to allow easy identification.
   d. Description: by default, this is used as the alt tag and should be filled in for images only.
   e. Syntax highlighting language: for non-binary files you can select what syntax highlighting to use (if any).This does not apply to images, PDFs, etc.
   f. Media Language Dependence:
      i. Fully independent: the media is the same in all languages and can hence not be translated.
      ii. Independent media file: the file and thumbnail exist independent of language. Other elements can be modified based on language.
      iii. Fully dependent: all elements depend on language and can be translated.
2. Click Save changes.

Using media items – Image

Objective

> You are going to add the image which you just uploaded into the Media Library to an existing content item by modifying the content "Writing for the Web".
> Ensure the image is in the top left corner.

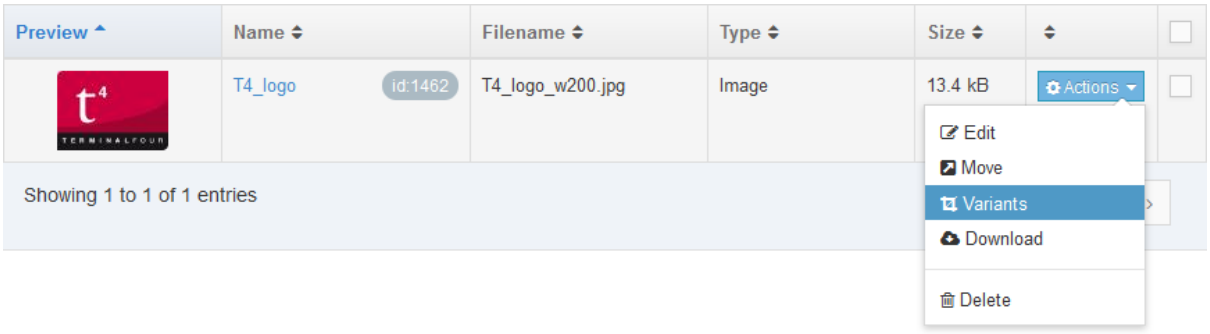


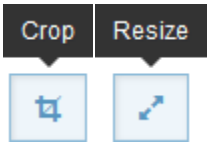
How to – add an image

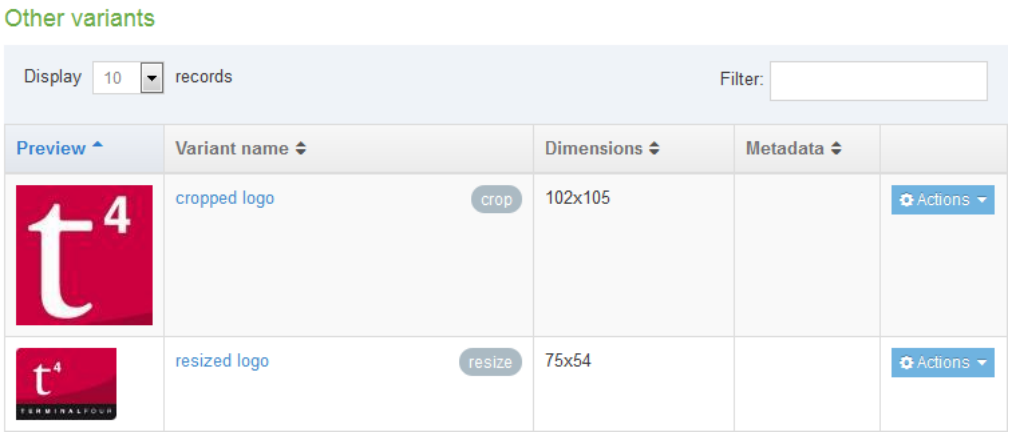
1. From the Site Structure screen, select Edit content from the Actions menu beside the section containing the content "Writing for the Web".
2. Click on the content's name to open it.
3. Place your mouse where you wish to insert the image within the main body of the content; then select Insert from Media from the toolbar.
4. The Media Library opens.
5. Navigate to the category where you uploaded the image earlier.
6. Hover over the image thumbnail and click Select.
7. The image is inserted in to your content.

Objective

> To fit an image into a piece of content, it may be necessary to resize or crop the image.
> To ensure the image is properly resized, use the Media Library's facility to create variants.







How to – create image variants

1. From your content, click Insert Media
2. Locate the image in the Media Library, click the Actions button → Variants.

3. From here you can either Crop or Resize the image.
4. Enter a Variant name and a Description.
5. Click Create variant.

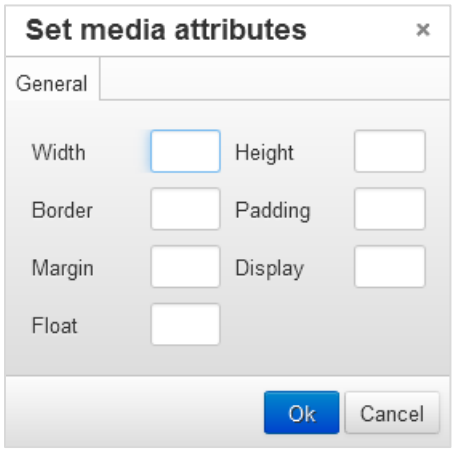
6. Add additional variants if needed.
7. Once you have added the necessary variants, click Save changes to save.

8. To use a variant in content; click on your logo and any variants associated to the image will be displayed.
9. Click Select to add the image variant to your content.
10. The variant is inserted in to your content.

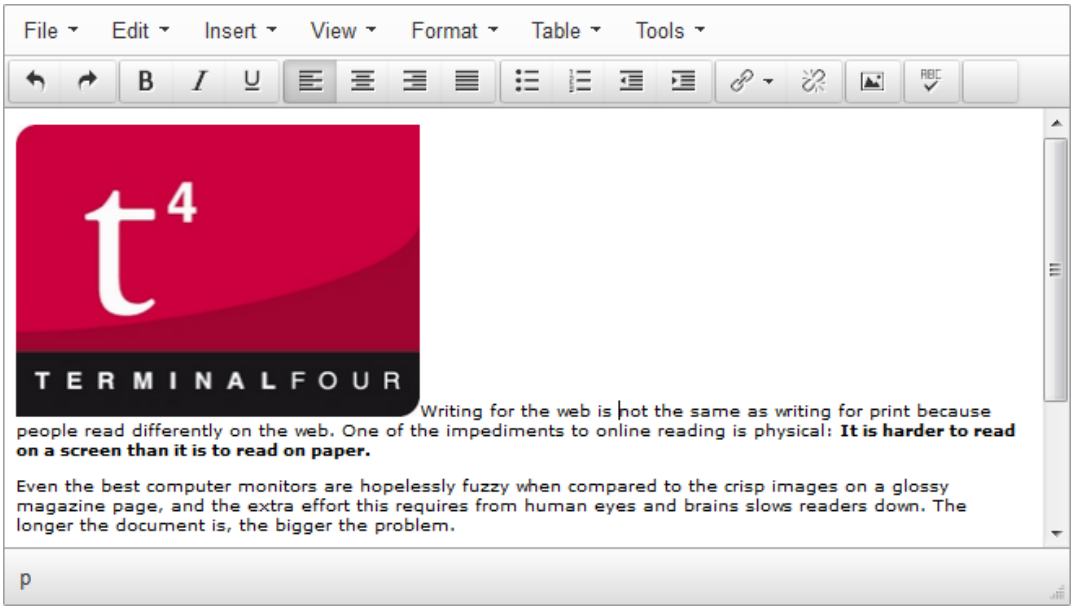
Edit Media Attributes

Objective

> You may want to specify where on the page an image should appear and how text is placed around this image. Set the Media Attributes which will let you specify Margin, Float, etc.



Double-click on an image to set media attributes

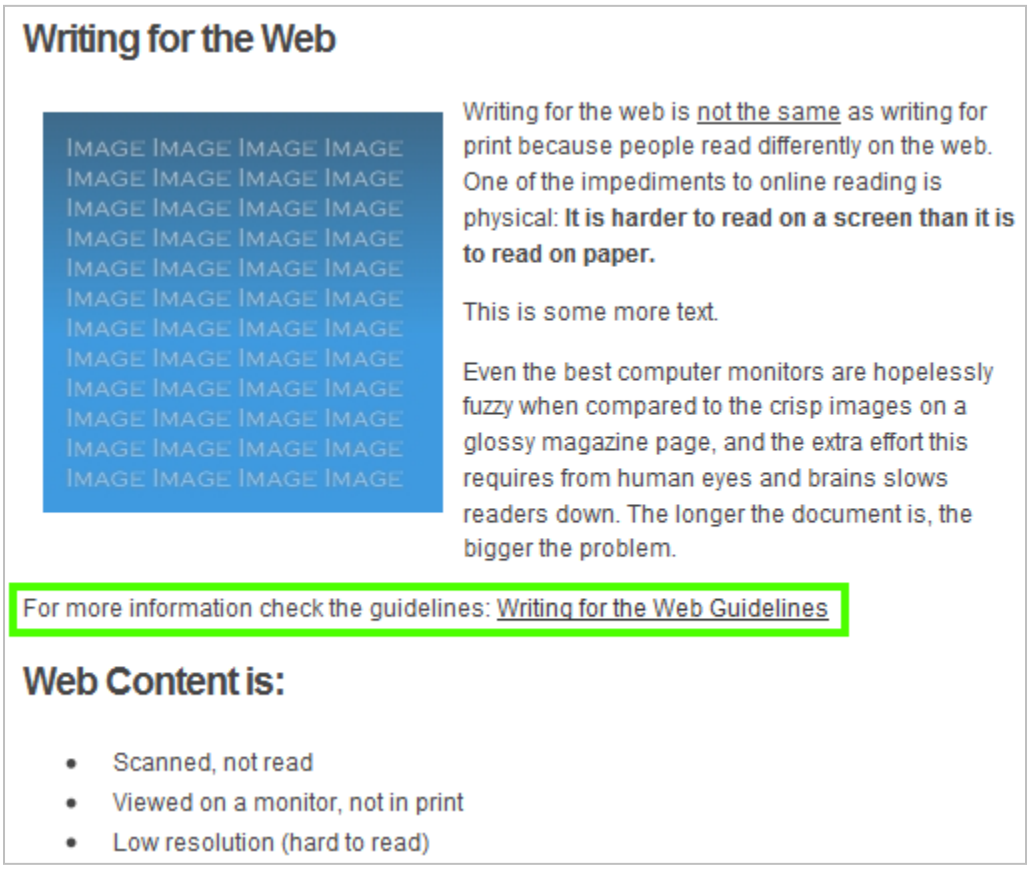


How to – edit media attributes

1. The image (or image variant) has been inserted in your content. If your Media Layout for images contains style options, you can set those from the content.
2. Double-click on the image to open the Media Attributes.
3. Specify the values you wish to set.
4. Click Ok to return to the content screen.
5. Preview your content to ensure you are happy with the result.
6. Click Save changes to save the changes made to the content.

Objective

- Modify the content "Writing for the Web".
- Open the Media Library and locate your category.
- Upload the PDF "Writing for the Web Guidelines" you have been given by the trainer.
- Add a link to the PDF file to your content.



How to – add PDF documents

1. From the Site Structure screen, locate the section you added your content to earlier.
2. Click the Actions menu and select Edit content.
3. In the Main Body of your content, place the mouse where you want to insert the link to the PDF; then click Insert Media
4. The Media Library opens. Locate the Category you wish to add the PDF to and click on it.

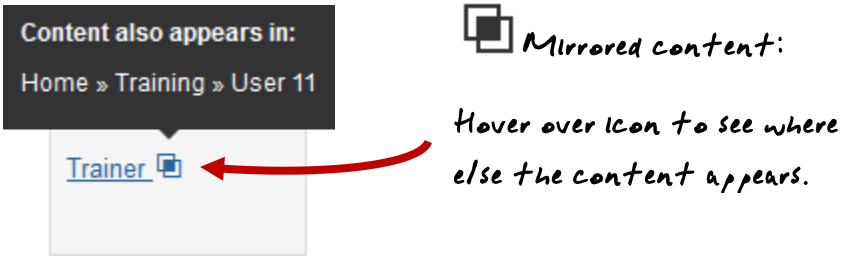
Continues >>

How to add PDF documents - continued

5. To add media to your category, click Add media (the use of **Name** and **Description** is dependent on your Media Layouts):
    a. Media file: click to select the relevant image.
    b. Media type: this will be automatically detected where possible. If an incorrect type is selected, select the media type from the list.
    c. Name: enter a name for your Image. By default, this is not output on the site, but is used only as a name in the Media Library to allow easy identification.
    d. Description: by default, this is not required for PDF documents .
    e. Syntax highlighting language: for non-binary files you can select what syntax highlighting to use (if any).This does not apply to images, PDFs, etc.
    f. Media Language Dependence:
        iv. Fully independent: the media is the same in all languages and can hence not be translated.
        v. Independent media file: the file and thumbnail exist independent of language. Other elements can be modified based on language.
        vi. Fully dependent: all elements depend on language and can be translated.
6. Click Save changes.
7. The PDF is ready to be inserted in your content; click on the PDF's name to insert it into your content.
8. The PDF has been inserted in your content
9. If you do not wish to use the PDF's Name as the link text, double-click on the PDF link text to open the Media Attributes.
10. In the empty Name element, enter the new link text.
11. Click Ok to return to the content screen.
12. Preview your content to ensure you are happy with the result.
13. Click Save changes to save the changes made to the content.

Objective

- Branches of the Site Structure as well as individual pieces of content can be Mirrored and Duplicated.
- Mirror a section if this feature is enabled. The options available will depend on the configuration. Alternatively, duplicate a section.
- Mirror or Duplicate a piece of content. When content is mirrored, updates from either location will affect the content from all locations. When content is duplicated, you create an independent piece of content.



How to – mirror and duplicate

Mirror/Duplicate Content

1. Select Modify Content from the Actions menu beside the section containing the content you wish to mirror or duplicate.
2. Select Mirror or Duplicate from the Actions menu beside the content.
3. The site structure opens. Click on the section you wish the mirrored/duplicated content to appear in. A small icon appears beside the mirrored content. Hover the mouse over it to see the various locations of the content. If content is duplicated it will appear as new content in the section you have duplicated the content to.

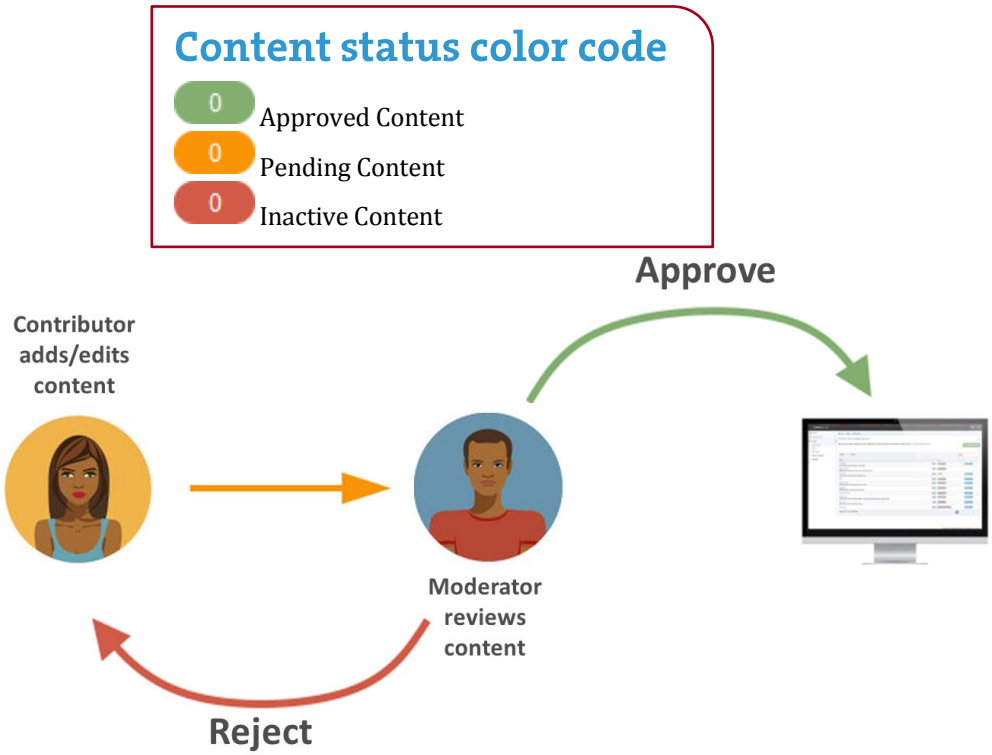
Mirror/Duplicate Branch

1. Select Mirror Branch or Duplicate Branch from the Actions menu beside the section or branch you wish to mirror/duplicate.
2. The options will vary and will be explained by the trainer.

Approve Content

Objective

> When content is added to the site, it will have to be approved before it can be published to "go live". The content you have created so far is all pending approval. Ensure your content is approved.

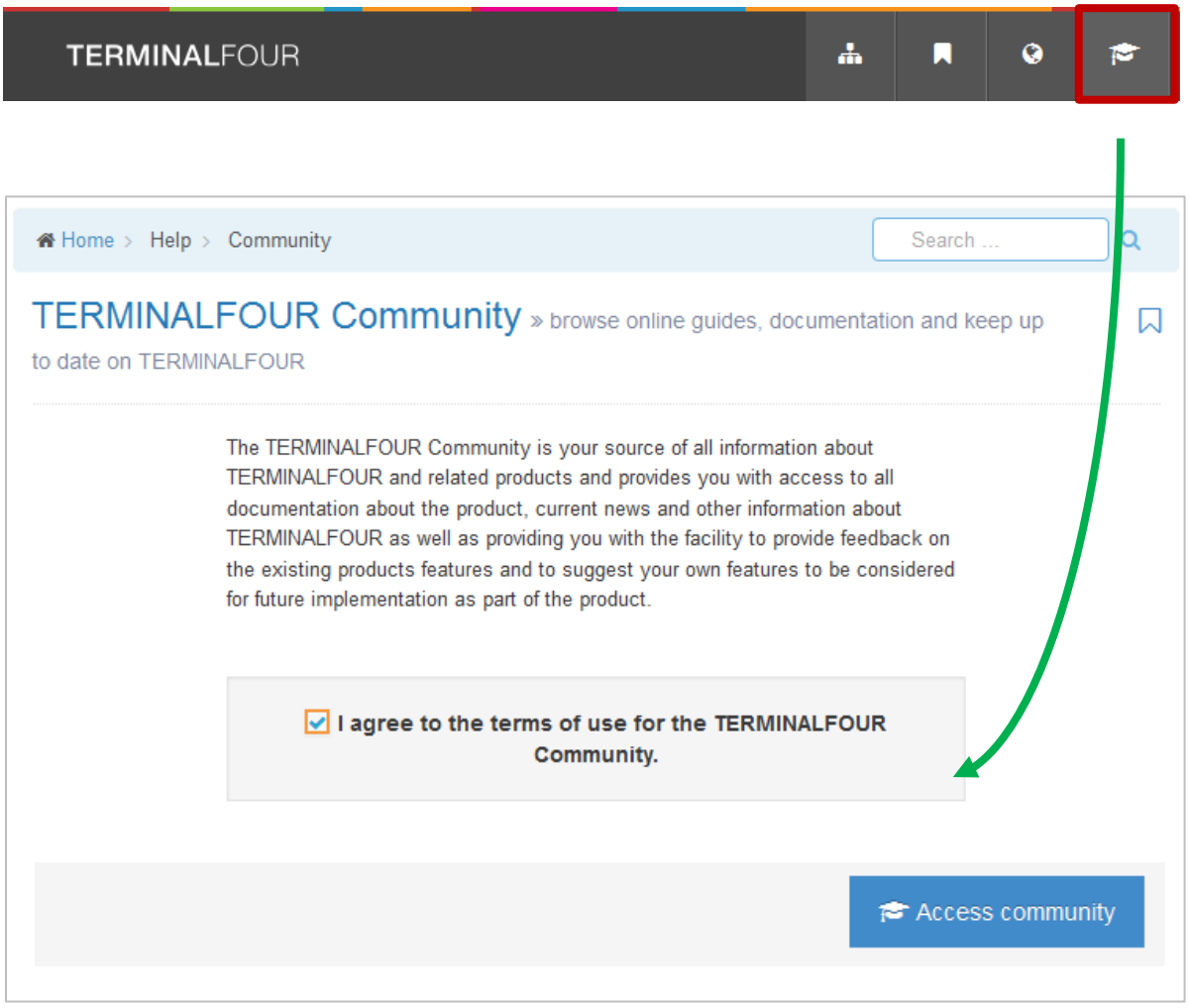


How to – approve content

1. To approve content, go to Content → Approve Content.
2. There are three tabs available to you; **Pending**, **Inactive**, and **Workflow**.
   a. The **Pending** tab will contain a list of content you can approve; you can sort by **name**, **priority**, or **last modified**. Hover your mouse over the section breadcrumb to see the exact path to the content.
   b. The **Inactive** tab will contain a list of any content which has been set as Inactive.
   c. The **Workflow** tab will list details of all content currently in a Workflow Queue.
3. From within the **Pending** tab; click the name of a piece of content to check the details.
   a. Preview the content by clicking on a channel from the **Published Channels** list.
   b. Click Show History to view any previous versions of the content.
   c. Click Edit if you wish to make changes to the content.
4. Click Approve if you are happy to approve content; otherwise, click Reject.
5. When content has been rejected, a **Reject Reason** can be added to explain the decision.
6. Once content has been approved, it will disappear from the main list.
7. In the Site Structure, the approved content appears in the green column 0

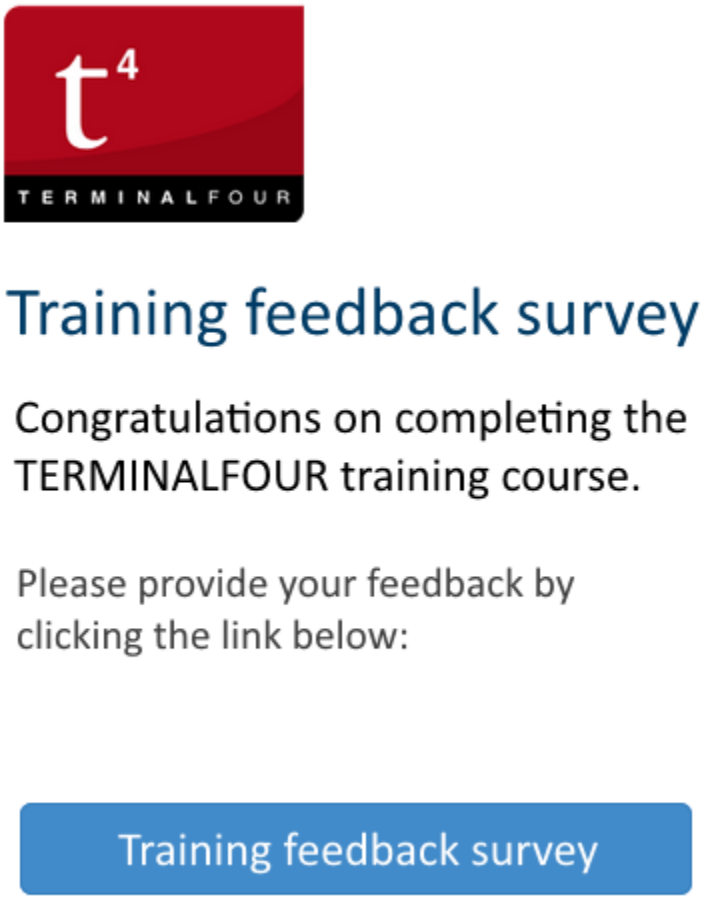
Objective

- TERMINALFOUR Community is your source of all information about TERMINALFOUR and related products. Being part of the TERMINALFOUR Community provides you with access to documentation about the product.
- Training material can be downloaded from the Training area of the TERMINALFOUR Community.



How to – access training material

1. To access the community area, click the TERMINALFOUR Community icon located towards the top right of the interface.
2. A new tab opens up, if this is your first time accessing the community area you will need to agree to the terms of use. Check the box to agree to the terms and click Access community.

Objective

> Congratulations on completing the End User training course.
> Please open our on-line survey and provide your feedback