



# Train the Trainer

## TERMINALFOUR 8.0

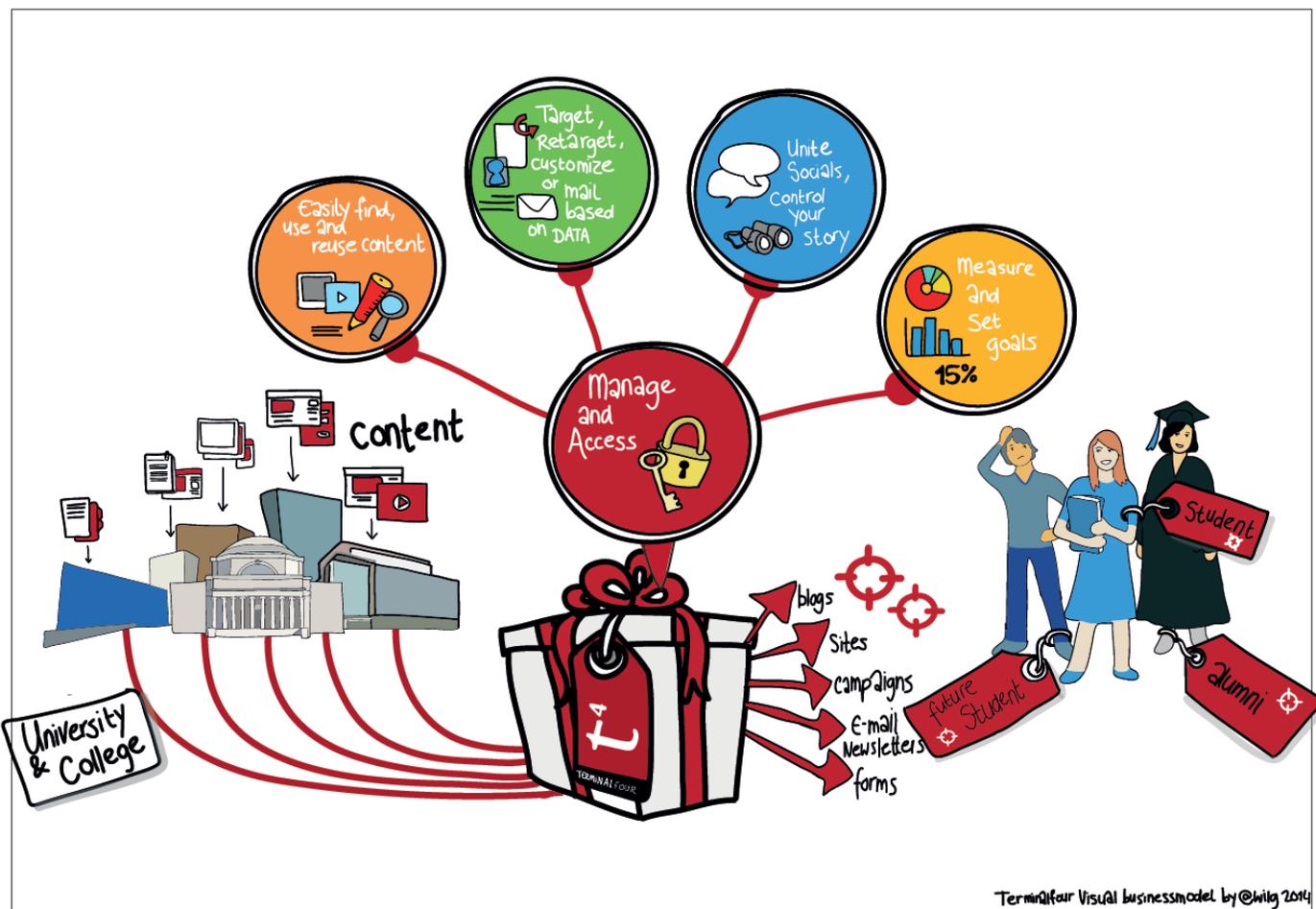
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## What is web content management?

- > At a basic level, TERMINALFOUR is used for building and maintaining large amounts of content.
- > Users at various levels can be given permission to add and modify content. All content goes through an approval cycle, at which point dedicated "approvers" review the content. In some cases this may be the authors who wrote the content; in other cases a more complex workflow may be used to allow several people to review the content.
- > Once content has been approved, it is ready to "go live". This happens in the publishing process. Page layouts (header/footer) and content layouts are wrapped around the content to ensure the content is displayed correctly.
- > One piece of content may be published to various channels. These are simply output mechanisms, like websites, mobile sites, paper publishing, etc. By applying the page layouts and content types, different displays can be achieved while still just producing one piece of content.
- > At the publishing stage, external data can also be incorporated. This could be information from a database, website or similar.



## Room set-up

The arrangement of the tables, chairs, equipment and lighting can impact the way your training will be received. How is the room set up? Will everyone be able to see you without straining? Does the seating arrangement allow for interaction? Try to move around the room to maximize interaction with the audience.

- > Is the room large enough to accommodate the participants?
- > Is a screen, projector and flip chart or white board available?
- > Can all participants see the screen?
- > Do all participants have a computer with access to the internet and TERMINALFOUR?
- > Are the washroom facilities easily accessible?
- > Is there adequate heating, cooling and ventilation in the room?

## Number of attendees

For training to be effective it is important to be able to afford individual attention to attendees as and when required. For this reason it is suggested that you consider limiting the maximum number of attendees to ten for this type of training.

## Training location

Whether training should take place in-house or not can always be discussed. An advantage of in-house training is that participants do not have to travel. A disadvantage is that they have easy access to their work station and can be distracted by work and perhaps lose focus on the training.

## Training objective

What will your audience expect to gain from the training? What is the purpose of the training? Set out an agenda for the day and agree upon breaks and lunch times.

General Purpose	Specific Purpose
<b>Inform</b>	At the end of the training, the audience will have a greater understanding of how TERMINALFOUR works and how it impacts their work
<b>Persuade</b>	At the end of the training, the audience will be familiar with the new Page Layouts and Content Types introduced and understand how to use them correctly.

## Dealing with participants' reactions

The following suggestions are provided to assist facilitators when dealing with participants who may experience difficulties with the changes required by the introduction of new knowledge and responsibilities:

Reactions to change	Why?	What to do
Participants feel awkward, uncomfortable or even worried...	They do not know what to expect...	Give examples and provide as much information as possible.
Participants complain about what they have to give up...	Change can involve letting go of responsibility...	Mention benefits of the change!
Participants feel they alone are having difficulties...	Change occurs on an individual basis, even if the change affects everyone...	Provide support and let them know who can help further.
Some participants learn quickly, others do not...	Not all people accept change straight away...	Be non-judgmental and accepting. Let the informal leaders in the group lead.
Participants are negative and do not want change...	People are concerned that they do not have the resources to do what is expected of them...	Indicate sources of support, resources to call, reference material.
After the course, participants return to the 'status quo', to the way things were before...	It is normal to revert to the way things were because it is known...	Be there to support staff and check on how they are doing. Solicit questions and concerns.

## Pre-training check List

Task	
Familiarize yourself with the material	
Identify and prepare slides you may want to use	
Identify, prepare and copy handouts	
Ensure you know your contact at the facility in case any problems arise	
Have extra paper and pens available for participants	
TERMINALFOUR URL	
TERMINALFOUR Login/password	
PC/Laptop for everyone	
Projector	
Flip chart and/or white board with pens	

## User roles in TERMINALFOUR

There are a 5 user roles in TERMINALFOUR, meet them below:



### Visitor Vinny

Hi, I'm a student at the University and a member of the Library. There's a members area of the library website which I have access to using my student authentication details. I can keep track of my library account from there.

### Contributor Carla

I work at the University Library  
I don't update content very often, but when I do I like to use Direct-Edit as it's easy to update the content. I have a moderator check my work before it gets published.



### Moderator Mike

I also work at the Library.  
Content that Carla and other Contributors create comes to me and I decide what gets published or revised.  
I have permission to add new pages to the website when needed.

### Power User Pete

I oversee the Library website.  
I can add content, but my main duties are to look after the look and feel of the Library site, I can change the page layouts and create new content types for the Contributors and Moderators to use.



### Administrator Ann

I oversee all of the Websites here at the University.  
My duties are similar to Power User Pete's but I get to oversee all the websites and have access to all areas within TERMINALFOUR.

## Contributors and Moderators

At the end of this training course you will be able to train both Contributors and Moderators. It is important to know the roles of each of these user types, as this will guide the content that is covered in your training session.

Task	Contributor	Moderator
Add content	✓	✓
Modify content	✓	✓
Delete content	✓	✓
Add files to the media library	✓	✓
Add pages		✓
Modify pages		✓
Delete pages		✓
Approve content		✓
Publish content		✓
Assign rights to contributors		✓

- > Tailor your training sessions based on the needs of your audience.
- > If possible train Contributors and Moderators separately.
- > Invite your trainees to bring examples of content along to the training session.



## Objective

- > Log in to TERMINALFOUR.
- > Open your user profile by clicking on Welcome in the black bar at the top right
- > To modify the profile, click [Edit profile](#)

First name *	<input type="text" value="Tracie"/>
Last name *	<input type="text" value="Edwards"/>
Email address *	<input type="text" value="tracie.edwards@terminalfour.com"/>
Current password	<input type="password"/>
New password	<input type="password"/>
Confirm password	<input type="password"/>
Default language	<input type="text" value="English"/>
HTML editor	<input type="text" value="training"/>
Preview channel	<input type="text" value="None"/>

Username

Password



## Make a note of your URL:

---



## How to log in...

1. Open a web browser and navigate to your TERMINALFOUR installation.
2. Enter your username and password; then click **Login**.
3. TERMINALFOUR opens. Click on your username in the top right corner to open your user profile:
  - a. You can change your **Password**.
  - b. If more than one **Language** is available, you can change the language. This will change the language of the site you work on when you log in.
  - 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. You can update your **Email Address**; this is used for notifications sent from TERMINALFOUR.
  - 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.



## Objective

- > It is recommended that you set up a training environment instead of using the live site for training. This can be done within the existing installation of TERMINALFOUR and can use the same Content Types and Page Layouts to make it as realistic as possible.
- > Remember to give your Training Site a “Pending” status so that it won’t be published on your live site.

Site structure						
University of TERMINALFOUR	N/A	N/A	2	1	0	Actions ▾
<ul style="list-style-type: none"> <li>Writing for the Web                             <ul style="list-style-type: none"> <li>Style Guide</li> </ul> </li> <li>News &amp; Events                             <ul style="list-style-type: none"> <li>News</li> <li>Events</li> </ul> </li> <li>Site Map</li> <li>Training</li> </ul>	N/A	N/A	1	2	1	Actions ▾
	N/A	N/A	1	0	0	Actions ▾
	N/A	N/A	1	0	0	Actions ▾
	N/A	N/A	2	0	0	Actions ▾
	N/A	N/A	0	1	0	Actions ▾
	N/A	N/A	1	0	0	Actions ▾
	N/A	N/A	0	0	0	Actions ▾

*Create a training area within your site structure*



## How to set up a “safe” training site. . .

1. If desired, you can set up a new channel for training and build the Site Structure within that.
2. Alternatively, within the site you want to use, create a new section for training and ensure it has a **Pending** status. This will ensure that it does not publish at any point.
3. Assign Page Layouts and Content Types to the training section based on what you want the trainees to use.
4. Set up users/groups and give them edit rights to the Training area of the Site Structure.



## Objective

- > To be able to control what users will access for training, it is a good idea to set up a training group and some training user ID; alternatively, you may wish attendees to use their own accounts. If Content Types are global, the users will still be able to use those. Otherwise you will need to share the Content Types with your Training group.
- > The steps below explain how to create a new user in TERMINALFOUR.

### Group information

Name \*

Description

Email address

Default preview channel

Group inheritance

### Group members

Filter:

Display  records Filter:

Username ^	Name ↕	User type ↕	Options
t_edwards	Tracie Edwards	Moderator	<input type="button" value="Remove"/>
v_omalley	Vincent O'Malley	Moderator	<input type="button" value="Remove"/>

Showing 1 to 2 of 2 entries

< 1 >



## How to set up users and/or groups for training. . .

1. **The following steps will need to be completed by an Administrator user.**
2. Go to **System administration** → **User rights & roles** → **User management**.
3. Click **Create new user +** and fill in the relevant information:
  - a. **First name**: enter the user's first name.
  - b. **Last name**: enter the user's last name.
  - c. **Username**: enter a username.
  - d. **Password**: enter a password of a minimum six characters.
  - e. **Confirm password**: confirm the password by entering it again here.
  - f. **Email address**: enter the user's email address. This is used for alerts and notifications.
  - g. **Profile image**: click **Select media** to select a profile image from the TERMINALFOUR media library.
  - h. **User type**: select the relevant level of user access (as instructed by the trainer).
  - i. **TERMINALFOUR user interface language**: select the language you wish to use for the interface.
  - j. **Default language**: select the language you wish to use for the site structure. The languages available will depend on your specific installation.
  - k. **HTML editor**: select the editor you wish to use for HTML elements. Depending on your set-up, several may be available.
  - l. **Preview channel**: select a channel the user works within, if possible. If you leave this as "no default", the user needs to select the relevant channel when previewing content.

[Continues >>](#)



## Community access >

Community access ▾

Assign access to the TERMINALFOUR community pages

T4 community Administrator access ▾

### T4 community:

Select End User access or Administrator access if you wish for the user to have access to the TERMINALFOUR Community.

End User access gives restricted access.



## Authentication methods >

Authentication methods ▾

Configure authentication methods available for this user

Name	Status	Identifier
Local	<input type="checkbox"/>	<input type="text"/>
LDAP	<input type="checkbox"/>	<input type="text"/>
Kerberos	<input type="checkbox"/>	<input type="text"/>
SAML	<input type="checkbox"/>	<input type="text"/>
CAS	<input type="checkbox"/>	<input type="text"/>

### Configure authentication methods available for this user:

If your users are managed externally you can configure the relevant authentication method here.



More information can be found in the TERMINALFOUR Community.



## How to set up users and/or groups for training - - - continued

4. Click **Save changes** to save the details.
5. The user has now been created and can log in. The user needs to be assigned to the relevant part(s) of the Site Structure, i.e. the **Training** section created earlier.



## Objective

Administrator users by default have edit rights to the entire site structure. All other user types need to be given their edit rights.

- > Give your users the right to edit the training site structure.

Select the More tab

Click 'Edit rights'

More ▾

- Metadata
- Subsections
- Edit rights**
- Access
- Mirrored sections

Edit available users and groups

Restrict by user type: All types

Display 10 records

Username	Name	Type	Options
acustomer	Aoife Customer	Visitor	+ Add
adirector	Anthony Director	Visitor	+ Add
admin	Training Training	Administrator	+ Add
apartner	Adam Partner	Visitor	+ Add
bburns	Brian Burns	Moderator	+ Add
bottsj	Joe Botts	Moderator	+ Add

Showing 1 to 10 of 42 entries

Current users and groups selected

Restrict by user type: All types

Display 10 records

No results found

Showing 0 to 0 of 0 entries

users with edit rights appear here



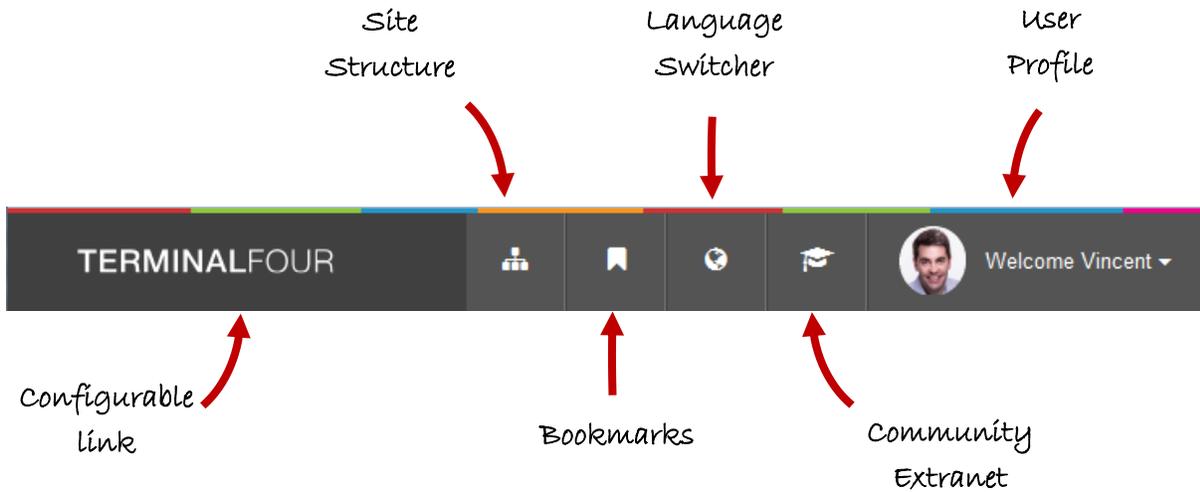
## How to assign edit rights...

1. To give a user or group edit rights, go to the Site structure and click on the relevant section.
2. Expand the **More** tab and click **Edit rights** as displayed above.
3. Use the **Filter** to find the relevant users or groups.
4. Click **+Add** beside the users you want to give access to the Section.
5. Click **Save changes**.



## Objective

- > The TERMINALFOUR interface has been designed to be fully responsive, which means it can be used on a desktop, laptop, tablet, and/or mobile device.
- > Familiarize yourself with the interface.
- > The interface for Contributors and Moderators will be different. It is suggested that you deliver training to Contributors and Moderators separately.



Content	▼
Create content	
Edit content	
Delete content	
Approve content	
Media library	

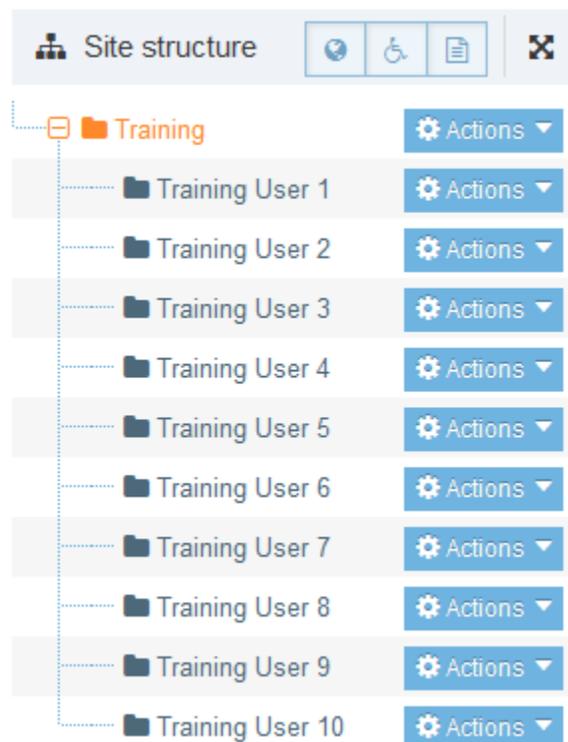
Measure	▼
Performance dashboards	▼
Quality control	▼

System administration	▼
About	



## 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.
- > Contributors cannot build onto the Site Structure.



### Section Icons

- Root Section (level 1 of a channel or micro site).
- Normal section.
- Hidden section.
- Pending section.
- Inactive section.
- Internal link section.
- External link section.
- Mirrored section.
- Archive section (content is not updated on publish).



### How to create a section...

1. On the site structure screen, locate the section under which you wish to add your first section. Click **Actions** → **+Create section**. 
2. Enter the relevant information to create a section. As a minimum, the **Name** must be filled in. All other default options are explained on the next page.
3. Click **Save changes** to save the section.
4. Repeat the steps above to add additional sections. Section information can be modified at any stage.

The screenshot shows a configuration interface with two main sections: 'General section details' and 'Advanced settings'. The 'General section details' section contains a 'Name' field with the placeholder 'e.g. News and events', a 'Status' dropdown menu set to 'Approved', and a 'Section options' group with four checkboxes: 'Mark as link section' (unchecked), 'Show in navigation' (checked), 'Archive section' (unchecked), and 'eForm section' (unchecked). The 'Advanced settings' section contains a 'Content owner' field with a 'Select content owner' button, an 'Output URI' field with the placeholder 'e.g. university-news-events', an 'Output file name' field with the placeholder 'e.g. my-filename.php', an empty 'SEO key phrases' field, a 'Default workflow' dropdown menu set to 'None', and an empty 'Access key' field.



## Section information

When creating sections, the only required element is **Name**. Additional 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.
- > **Selection option**:
  - o **Mark as link section** check this to create a section linking directly to another section or an external URL. This section cannot contain content.
  - o if *unchecked*, the section will not appear in navigation and will be displayed in the site structure with a clear folder icon.
- > **eForm section**: check this box if eForms are going to submit to this section. This will be covered later.
- > **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.
- > **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.
- > **SEO key phrases**: in order to run an SEO report for a channel, one or multiple comma-separated SEO Key Phrases must be set, at least at the root level.
- > **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.



## 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.

+ Drag & drop sections to reorder

Enable automatic ordering

Bulk options

Display 10 records Filter:

Order	Name	Last modified	Actions
+	Who we are	January 22 2015 4:54 PM	Actions ↑
+	News	January 22 2015 4:55 PM	Actions ↑
+	Courses	January 22 2015 4:55 PM	Actions ↑
+	Research	January 22 2015 4:56 PM	Actions ↑
+	Campus life	January 22 2015 4:56 PM	Actions ↑

Showing 1 to 5 of 5 entries



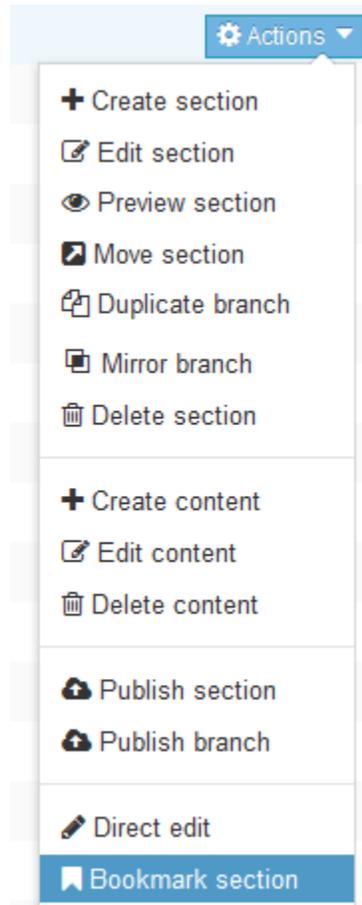
## How to move sections. . .

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.
3. To **reorder** sections, click the **Site structure** icon.
4. From the **Actions** menu  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 or more of your sections.



*Open the actions menu and bookmark your section*



## How to bookmark sections. . .

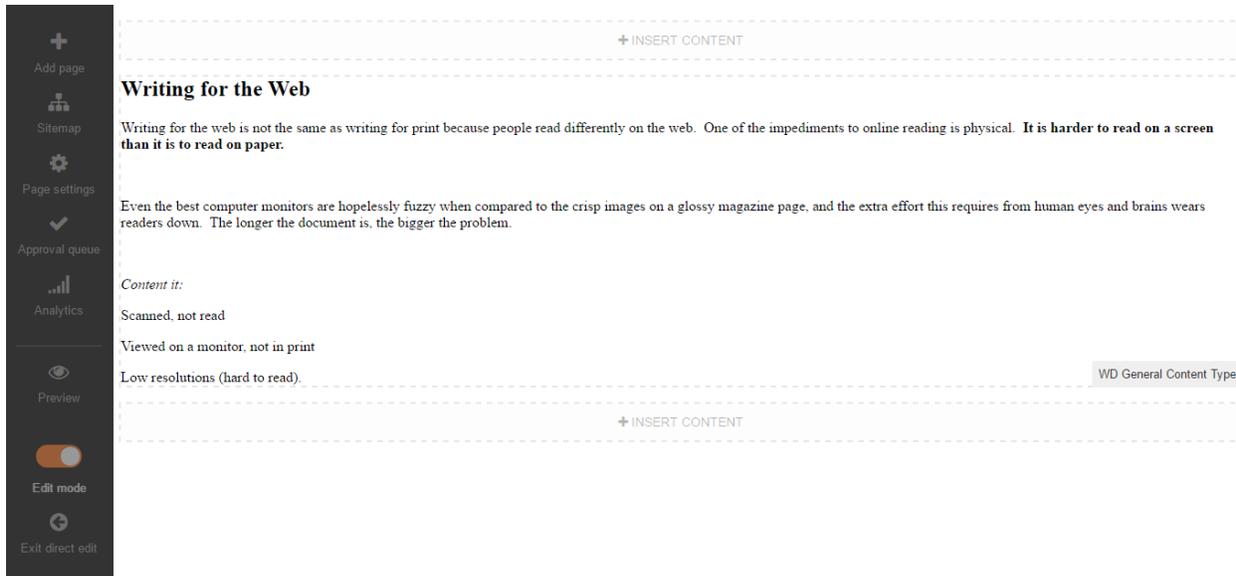
1. Select **Bookmark section** from the **Actions** menu  beside the section you wish to bookmark.
2. Check the bookmarks tool to see that your section has been added as a bookmark.
3. Areas of TERMINALFOUR can also be bookmarked, by clicking on  located towards the top right-hand-side of the screen.





## 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 use Direct Edit. . .

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 and 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 add links...

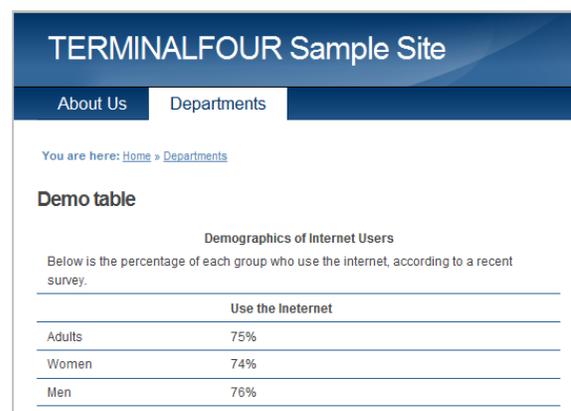
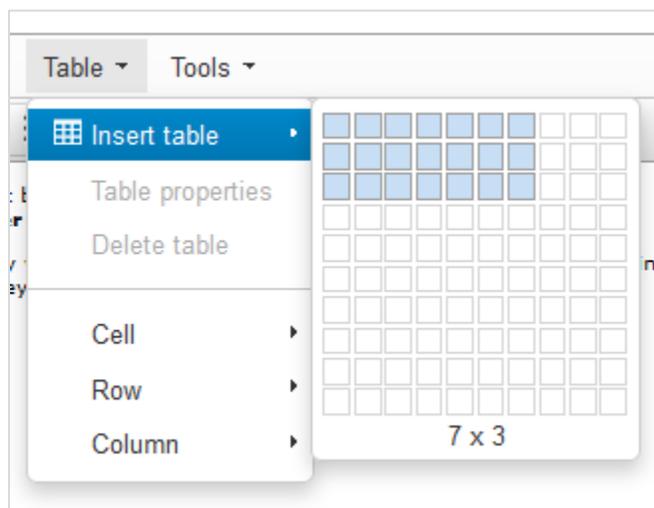
6. **External Link:** e.g. <http://www.terminalfour.com>.
  - a. Type the text you wish to use as your link text; e.g. TERMINALFOUR.
  - b. Highlight the text; then select **Insert external link** from the WYSIWYG.
  - c. The Insert/Edit Link Window opens; complete the details as required.
    - i. **URL:** 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.

Click here to begin creating a table



## How to create a table...

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.

Version history for this piece of content

Display 10 records Filter:

Name	Version	Owner	Last modified	Last modified by	Previous	
Writing for the Web	0.2	Inherited	19 January 2015 1:14 PM	vomalley	0.1	Actions
Writing for the Web	0.1	Inherited	19 January 2015 1:11 PM	vomalley	0.0	Actions

Showing 1 to 2 of 2 entries

Select two versions of content and click Compare selected

Elements where changes have occurred are highlighted in yellow

**Version 0.5**

Name Writing for the Web

Heading Writing for the Web

Main body

Writing for the web is not the same as writing for print because people read differently on the web. One of the impediments to online reading is physical: **It is harder to read on a screen than it is to read on paper.**

**Web Content is:**

- Scanned, not read
- Viewed on a monitor, not in print
- Low resolution (hard to read)
- Added a new bullet point here

**Version 0.4**

Name Writing for the Web

Heading Writing for the Web

Main body

Writing for the web is not the same as writing for print because people read differently on the web. One of the impediments to online reading is physical: **It is harder to read on a screen than it is to read on paper.**

**Web Content is:**

- Scanned, not read
- Viewed on a monitor, not in print
- Low resolution (hard to read)



## How to modify content. . .

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.

*Schedule a publish date*

*Select time*



## How to manage publish dates. . .

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.



## Objective

- > It is recommended that you set up a training environment within the Media Library instead of using the live site for training. This can be done within the existing Media Library to make it as realistic as possible.
- > It is possible to assign read and write access to different users/groups, so not all users necessarily need to have permission to upload files into the Media Library.

The screenshot shows the Media Library interface. On the left, there is a tree view of categories under 'Media categories', including 'University of TERMINALFOUR' with sub-categories like 'PDF Files', 'Images', 'JS Files', and 'CSS Files'. On the right, there is a table of media items. The table has columns for 'Name', 'Filename', 'Type', and 'Size'. One item is listed: 'T4\_logo' (Image, 13.4 KB). The interface also includes a 'Display' dropdown set to '10 records', a 'Filter' input field, and a 'Showing 1 to 1 of 1 entries' indicator at the bottom.



## Media Library Overview

- > The **Media Library** can be accessed either as a separate item (go to **Content** and select **Media Library**) or directly from a piece of **Content**.
- > By default, only Administrators have write access, and all user types have read access.
- > It is possible to add additional categories to the Media Library.
- > If you modify a Category, you can determine the **Write Access**, **Read Access**, **Workflow**, **Media Categories** (manual and automatic ordering), **Auto Publish** and **Access Control**.
- > The **Add Media** button allows you to add new media items to the category you have selected.
- > You can **Search** for an item by entering keywords or an ID.
- > You can **Filter** results by typing into the Filter tool.
- > You can switch between **Detailed Mode** and **Preview Mode**.



## How to set up a Media Library training space. . .

1. **The following steps will need to be completed by an Administrator user.**
2. To add a **Category**, go to **Content** and select **Media Library**.
3. The Media Library opens; click on the Actions button beside the category you want to add a new Training category to.
4. Give the new category a name, e.g. "**Training**".
5. The new category will be added to the Media Library.
6. Click the Actions button beside your new **Training** category and click **Edit category**.
7. Select the **Access** Tab and click **Write access**.
8. Add the user(s) or group(s) you want to give write access to the Training category.
9. Click **Save changes** to save the details.
10. Members can be added and removed at any point.

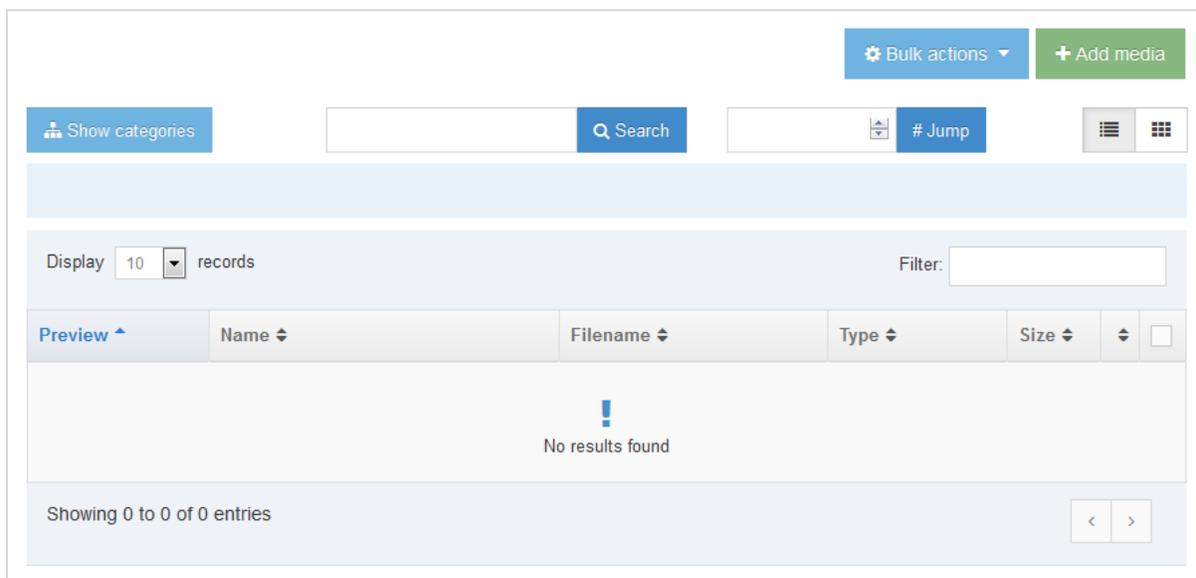


## Objective

- > 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.



Open the actions menu and select: Create sub-category



## 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.

General

Categorisation

### Media details

Media file \* Drop files here or click to choose

Media type Image ▼

Name \*

Description e.g. A student sitting under a tree

Syntax highlighting language HTML/XML ▼

Media language dependence  
 Fully independent  
 Independent media file  
 Fully dependent



## 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.
  - 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**.



## 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.

### Writing for the Web

IMAGE IMAGE IMAGE IMAGE  
 IMAGE IMAGE IMAGE IMAGE

Writing for the web is not the same as writing for print because people read differently on the web. One of the impediments to online reading is physical: **It is harder to read on a screen than it is to read on paper.**

This is some more text.

Even the best computer monitors are hopelessly fuzzy when compared to the crisp images on a glossy magazine page, and the extra effort this requires from human eyes and brains slows readers down. The longer the document is, the bigger the problem.

**Web Content is:**

- Scanned, not read
- Viewed on a monitor, not in print
- Low resolution (hard to read)



## 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.

Crop

Resize

Preview ^	Name ⇅	Filename ⇅	Type ⇅	Size ⇅	⇅	☐
	T4_logo <span style="float: right; border: 1px solid #ccc; border-radius: 5px; padding: 2px;">id:1462</span>	T4_logo_w200.jpg	Image	13.4 kB	⚙️ Actions ▾	☐

Showing 1 to 1 of 1 entries

- Edit
- Move
- Variants
- Download
- Delete

### Other variants

Display 10 records
 Filter:

Preview ^	Variant name ⇅	Dimensions ⇅	Metadata ⇅	☐
	cropped logo <span style="float: right; border: 1px solid #ccc; border-radius: 5px; padding: 2px;">crop</span>	102x105		⚙️ Actions ▾
	resized logo <span style="float: right; border: 1px solid #ccc; border-radius: 5px; padding: 2px;">resize</span>	75x54		⚙️ Actions ▾



## How to create variants of an image. . .

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.



## Objective

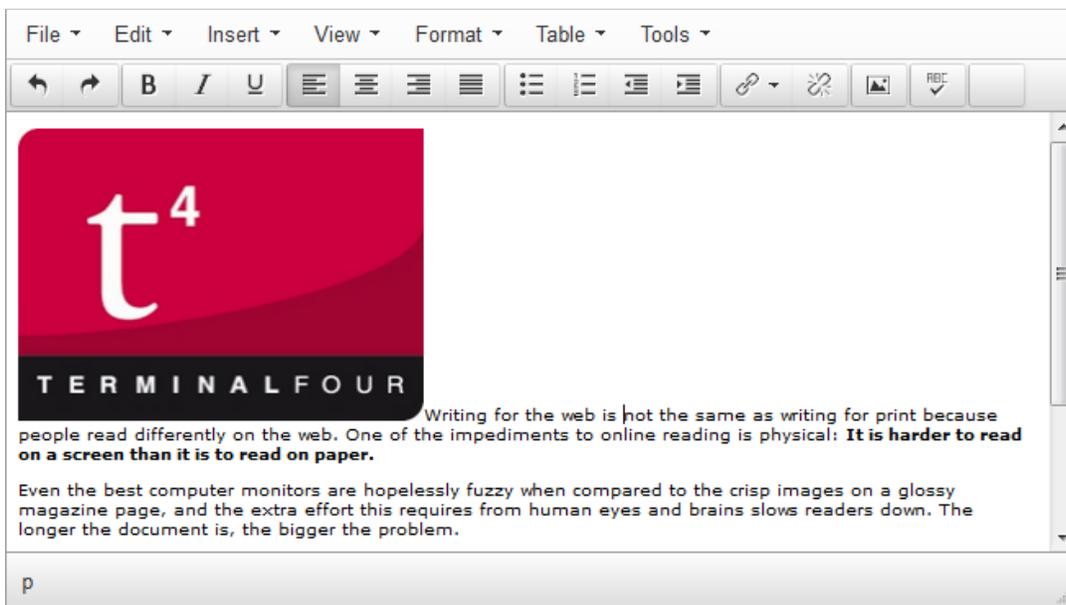
- > You may want to specify where on the page an image should appear and how text is placed around this image. Set the Media Attributes which will let you specify Margin, Float, etc.

**Set media attributes** x

General

Width <input style="width: 40px;" type="text"/>	Height <input style="width: 40px;" type="text"/>
Border <input style="width: 40px;" type="text"/>	Padding <input style="width: 40px;" type="text"/>
Margin <input style="width: 40px;" type="text"/>	Display <input style="width: 40px;" type="text"/>
Float <input style="width: 40px;" type="text"/>	

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.

### Writing for the Web

IMAGE IMAGE IMAGE IMAGE  
IMAGE IMAGE IMAGE IMAGE

Writing for the web is not the same as writing for print because people read differently on the web. One of the impediments to online reading is physical: **It is harder to read on a screen than it is to read on paper.**

This is some more text.

Even the best computer monitors are hopelessly fuzzy when compared to the crisp images on a glossy magazine page, and the extra effort this requires from human eyes and brains slows readers down. The longer the document is, the bigger the problem.

For more information check the guidelines: [Writing for the Web Guidelines](#)

### Web Content is:

- Scanned, not read
- Viewed on a monitor, not in print
- Low resolution (hard to read)



## 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.



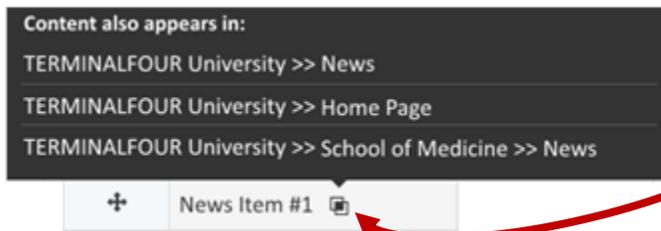
## Objective

- > 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.



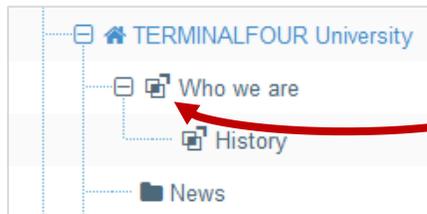
## Mirror content/Sections configuration

- > You can enable/disable the mirroring of sections or content by changing the settings:  
 System administration → Hierarchy & content settings → Hierarchy → Enable mirroring of sections  
 System administration → Hierarchy & content settings → Hierarchy → Allow non-mirroring of content



Mirrored content:

Hover over icon to see where else the content appears.



Mirrored section



## How to mirror and duplicate content and sections. . .

### Mirror/Duplicate Content

1. Select **Edit 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. The duplicated content, however, will appear as new content.

### Mirror/Duplicate Section

1. Select **Mirror Branch** or **Duplicate Branch** from the **Section Drop-Down Menu** beside the section containing the content you wish to duplicate.
2. Select the Section you wish to place the mirrored or duplicated section under.
3. A mirrored section's folder symbol will have an arrow pointing out for the original section and an arrow pointing in for the new section.

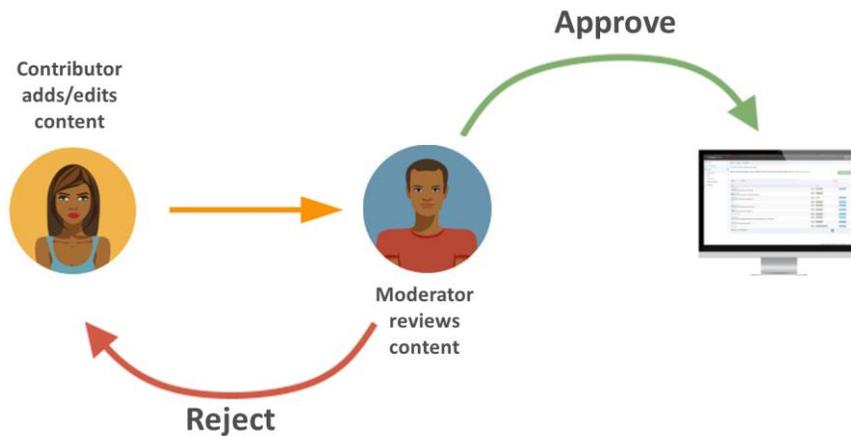


## Objective

- > 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.

### Content status color code

- 0 Approved Content
- 0 Pending Content
- 0 Inactive Content



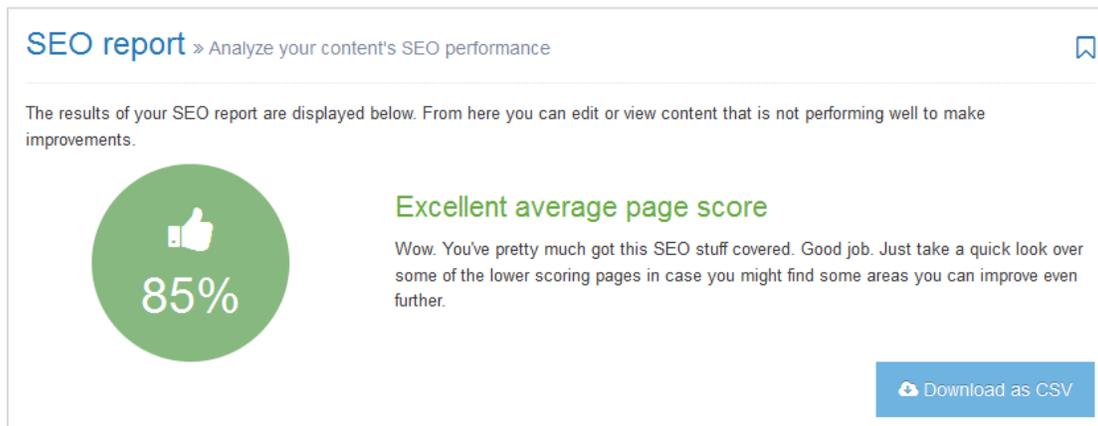
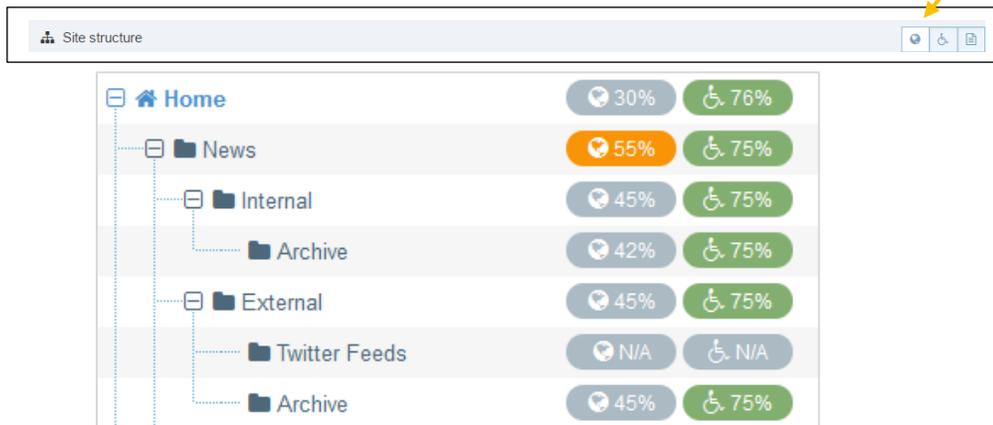
## How to approve content. . .

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

- > Accessibility checking functionality in TERMINALFOUR allows you to determine how accessible your content is. This is important to ensure your site can be used by people with visual impairments, etc.
- > Search Engine Optimization (SEO) checking functionality in TERMINALFOUR allows you to determine how easily a search engine can find your content. This information can then be used to increase the visibility of content.
- > Based on the information in the report, you can improve your content and hence obtain better ranking in the search engines.
- > Accessibility and SEO Reports can be run by Administrators; these can be scheduled to run periodically.



## How to run an accessibility and SEO report. . .

1. Ask an Administrator to run an Accessibility or SEO report. For one of your sections, click on the colored bar in the Accessibility or SEO column; this will open up the **Detailed results**.
2. A **Data Summary** is displayed; click on **Detailed page report** for more detailed information.



### Objective

- > Below is a list of some of the Content Types which are going to be used on your website. You may wish to pick one or two of these to focus on when training End Users

Content Type Name	Description
<p>Example: News</p>	<p>Example: This content type is to be used when adding news items to a page. It is only available to approved Users and only enabled for use on certain pages of the website. A workflow rule applies to the approval process of all News content.</p>



## Objective

- > For users to be able to add content, they need to have access to Content Types from the site structure. To use a Content Type, a user must also be a member of the group in which the Content Type is available.

General | Content | **Content types** | Page layouts | More ▾

Content types that are assigned to this section

Display 10 records Filter:

Content type	Group	Enabled (branch)	Enabled (section)	Disabled
T4U File download Use for adding files to your page	T4U Group	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
T4U General Content Use this to add general pieces of content to your page	T4U Group	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
T4U Left content Use this to add content to the left of your page	T4U Group	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
T4U News Use to add a News item to your page	T4U Group	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Showing 1 to 4 of 4 entries < 1 >



## How to assign content types. . .

1. Assuming you already added the users to the relevant groups previously, from the Site Structure, click **Edit section** beside the section you wish to assign the Content Type to, i.e. **Training**.
2. Select the **Content types** tab.
3. Select the radio button to enable the Content Type either at **branch** or **section** level. If you select "branch", the Content Type can be used for this section and its sub-sections. If you select "section", the Content Type can only be used for this section.
4. Click **Save changes**.



## Objective

- > You can decide which Page Layout you want to use to display the training content. You may want to opt for an “inner” page layout to make as much room for content as possible. The example below has the content area highlighted.

The screenshot shows the Terminal Four University website. At the top left is the university logo with the text 'TERMINALFOUR UNIVERSITY' and 'Est. 1932'. To the right are links for 'Social Stream', 'Staff login', and 'Sitemap', along with contact information: '+1 555 123 456' and 'info@t4u.edu'. Below this is a navigation bar with 'COURSE HUB', 'LIFE AT T4U' (highlighted), 'RESEARCH', 'ALUMNI', and 'ADMISSIONS', plus a search bar. The main content area features a large image of a laptop on a wooden table. Below the image is a 'Navigation' sidebar with links like 'Our campus', 'Residential services', 'Dining services', 'FAQ', and 'Student Support'. A breadcrumb trail shows 'HOME / LIFE AT T4U'. The main content area is titled 'Life at T4U' and contains text about the university's campus life. This content area is highlighted with a red box.

*Choose a page layout that allows content to be added*



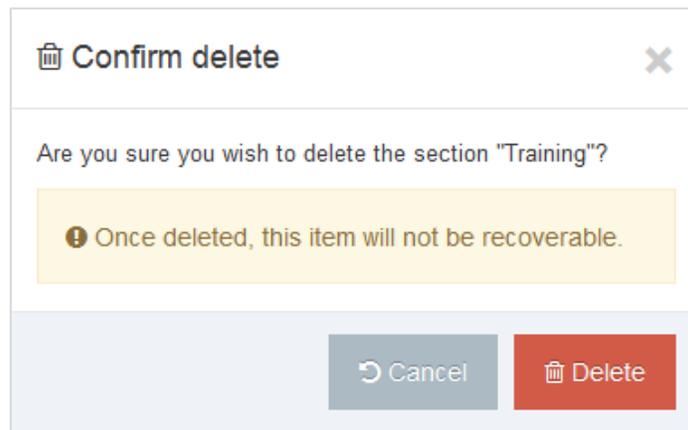
## How to assign a page layout. . .

1. From the Site Structure, click **Edit section** within the training section **Action** menu.
2. Select the **Page layout** tab and select the relevant page layout for your site.
3. Click **Save changes**.
4. **Preview** to ensure the new page layout has been applied and works as expected. This will require that you have a piece of content to preview first.



## Objective

- > Once training has been completed, you may wish to delete the attendees' work in preparation for the next training session.
- > Delete sections and content which are no longer required.



Select 'Delete section' from the Actions menu



## Did you know?

- > When you delete a piece of content in TERMINALFOUR, you do not remove it from the system immediately. Instead, an Administrator will approve the deletion before it disappears from view. Once this is done, the content and its history will be gone from the database.



## How to clean things up after training. . .

1. Decide which of the training sections you wish to delete.
2. Select **Delete section** from the **Actions** menu beside the section you wish to delete. This will delete the current section and all of its sub-sections (branch).
3. You will be asked to confirm delete, click **Delete** to confirm.
4. Repeat the above steps until you have deleted all the unwanted training sections.

**The following steps will need to be completed by an Administrator user.**

5. To Purge a Section or Content, go to **Content** → **Recycle content**.
6. The **Inactive content** tab displays all content which have an Inactive status.
  - a. Check the content you wish to purge.
  - b. Click **Purge content** to remove content.
  - c. A warning is displayed that you are about to delete content, click **Purge** to completely purge the content.

[Continues >>](#)



## How to clean things up - continued

7. The **Inactive sections** tab displays a list of all sections which have an Inactive status.
  - a. Check the sections you wish to purge.
  - b. Click **Purge sections** to remove the sections.
  - c. A warning is displayed that you are about to delete the section(s), click **Confirm** to completely purge the content.
  - d. If a purged section contained content, this content will now be moved to the **Orphaned content** tab.

[Continues >>](#)

Inactive content

Inactive sections

Orphaned content

### Orphaned content

Display  records Filter:

Name <span style="float: right;">▲</span>	Last modified <span style="float: right;">↕</span>		<input type="checkbox"/>
Writing for the Web <span style="float: right; border: 1px solid #ccc; border-radius: 50%; padding: 2px;">id: 6</span>	March 20 2015 12:05 PM	Actions <span style="float: right;">▼</span>	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries < 1 >

Purge content



## How to clean things up - continued

8. The **Orphaned content** tab contains a list of all content which previously resided in a section which has been purged.
  - a. If you do not wish to delete the content:
    - i. Click the content's **Actions** menu → **Move content**.
    - ii. The Site Structure will be displayed.
    - iii. Select a new location for the content; click on a **Section** and click **Add content**.
    - iv. The content will be moved to your chosen section.
  - b. If you do wish to delete the content:
    - i. Check the content you wish to purge.
    - ii. Click **Purge content** to remove the content.
    - iii. A warning is displayed that you are about to delete the content, click **Confirm** to completely purge the content.



## Objective

- > The TERMINALFOUR Community is an online resource which will provide you with documentation, training material and extra resources which will aid you in using TERMINALFOUR and training your users.

The screenshot shows the TERMINALFOUR interface. At the top, there is a dark navigation bar with the text 'TERMINALFOUR' on the left and four icons on the right: a group of people, a bookmark, a refresh symbol, and a graduation cap icon. The graduation cap icon is highlighted with a red rectangular box. Below the navigation bar, the main content area has a light blue header with a breadcrumb trail: 'Home > Help > Community'. To the right of the breadcrumb is a search bar. Below the breadcrumb, the heading 'TERMINALFOUR Community' is followed by the text '» browse online guides, documentation and keep up to date on TERMINALFOUR'. A paragraph of text describes the community as a source of information and a place for feedback. Below this text is a grey box containing a checked checkbox and the text 'I agree to the terms of use for the TERMINALFOUR Community.'. At the bottom right of the page is a blue button with a graduation cap icon and the text 'Access community'. A green arrow originates from the red box around the graduation cap icon in the navigation bar and points to the 'Access community' button.



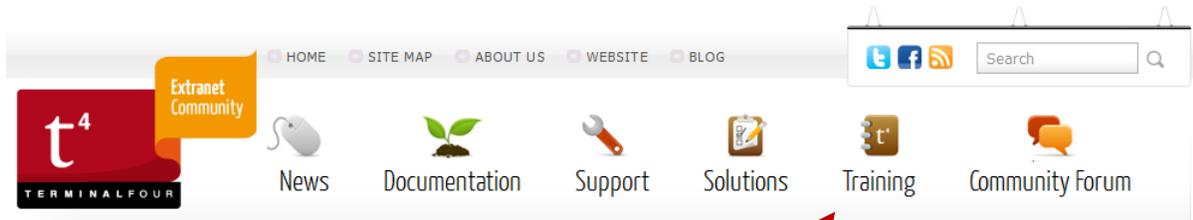
## How to access the TERMINALFOUR Community...

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**.

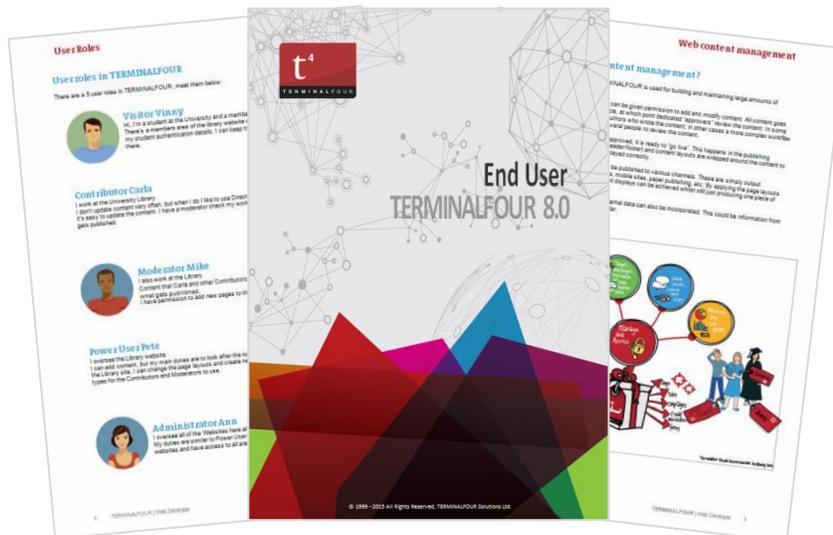


## Objective

- > To help you create your training material, we have produced a generic End User training manual which you may find useful.
- > Download the most up-to-date version of training manuals from the TERMINALFOUR Community.



Training resources located here



## How to access training material. . .

1. In the TERMINALFOUR Community area, click **Training**.
2. From here you have access to a number of training resources, such as the End User training manual, and online documentation.



## Objective

- > Congratulations on completing the Train the Trainer course!
- > Please open our on-line survey and provide your feedback



## Training feedback survey

Congratulations on completing the  
TERMINALFOUR training course.

Please provide your feedback by  
clicking the link below:

[Training feedback survey](#)