CONTRIBUTE END USER TRAINING GUIDE

OVERVIEW

Contribute is the software used by URMC web authors to update their web content. Contribute is a WYSIWYG (What You See Is What You Get) editor that allows authors to make changes to their web pages with a user-friendly interface. Contribute is best used for day-to-day text changes on web sites. It is not a tool for creating or editing forms or high-level applications.

Currently, Contribute is administered by URMC Web Services and Information Systems Division (ISD), and depending on what site you're editing, you'll need to contact one of these groups for support. For Contribute support of URMC public websites (www.urmc.rochester.edu and www.stronghealth.com), file a ticket with Web Services through our ticketing system at **http://websupport.mc.rochester.edu** or send an email to **websupport@urmc.rochester.edu**. For Contribute support of an intranet site (intranet.urmc.rochester.edu), file a ticket with Information Systems Division Help Desk at HelpDesk_ISD@urmc.rochester.edu.

URMC PUBLIC WEB CONTRIBUTE SUPPORT

For more information about using Contribute, including troubleshooting FAQs, getting access to your site, a how-to library, go to our Sharepoint site at http://inside.mc.rochester.edu/sites/PublicWS/customer-support/contribute/default.aspx.

THE CONTRIBUTE WORKFLOW

All web authors who edit web pages on either WWW or intranet sites will edit on a development server. This means that you will not be able to edit directly on any live server. Live sites are designated with web addresses beginning with http://www or http://intranet. Development sites are designated with addresses beginning with http://dev.mc, http://dev.stronghealth, or http://intraqa.

Browse to a page. In Contribute, you can find the page you want to edit by clicking links or typing web addresses as you would in a web browser. The browser toolbar has the familiar navigation buttons to help you navigate to files.

Edit your content. When you find the page you want to edit, click on the Edit Page button to open the page in the editor. Contribute copies the file from your web server and locks it on the server so no one else can edit the page while you're working on it.

The Contribute editor works much as a word processor does. You can edit text, images, tables, and links in the page, and you can even add links to Microsoft Word or PDF documents to your website. The toolbar contains familiar editing buttons, plus buttons for saving your edits until later, canceling your edits, or publishing your edits to the website.

Send draft for review. A few sites have a review process in place. Typically, users who are editing these sites can edit but not publish the drafts. They must send for review to a designated publisher for the site. The publisher can then make changes to the draft and/or publish the updates.

Publish the changes. If you are a publisher for your site, when you finish editing your page, you may publish your page by clicking on the Publish button. If you are editing on a public facing site, your changes will automatically be written to both the development and live servers. If you are editing on the intranet, your changes will promote overnight and will appear live the following day. Upon publishing, Contribute unlocks the file on the development server so other users can edit the page.

If you want to send the page to another Contribute user for review, click on the Send For Review button. This enables you to collaborate with others on your site. The Send For Review button will automatically notify the person to whom you sent the draft.

> **Note: Contribute will automatically promote published pages to the live server. You will not be required to submit a ticket to upload your pages.**
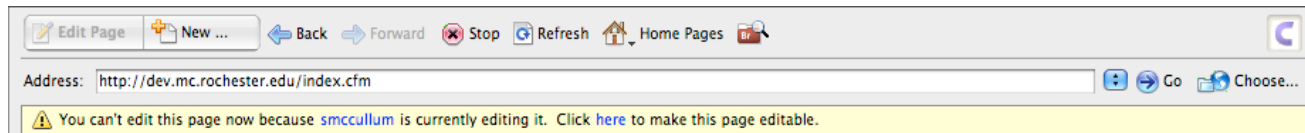
USING CONTRIBUTE

BROWSING TO A PAGE
When in Browse mode, the Contribute interface contains:

- A toolbar with Back and Forward buttons

- An address bar that contains the web address of each page you browse

- A content window that displays the content of the web page

The only obvious difference between the Contribute interface and your web browser's interface is the left sidebar. At the top of the sidebar is the Pages panel where your drafts will be stored until they are either sent for review or published. Below that is the How Do I… panel where you can access Contribute's help files.

On occasion, while browsing to a page you need to edit, you will notice a message displayed in a yellow box under the address bar. The message might say that you do not have permission to edit a page, or that someone else is currently editing it. For example, if you browse to the URMC home page at http://dev.mc.rochester.edu/index.cfm, you will see the following message:

EDITING A PAGE

Before you can edit your page, you must first make sure that:

- **Contribute is installed (we're currently using CS3).**
- **You have been added to a "role" that gives you access to a particular site.**
- **You have entered a connect address in Contribute to establish your connection.**

Clicking on the Edit Page button located on the browser toolbar switches you from browse mode to edit mode. The browser toolbar is replaced with the edit toolbar.

The edit toolbar contains options for publishing (publishers only), sending for review, saving and discarding your draft, as well as formatting tools (see illustration below). Several of the formatting items are similar to what you would find in word processing programs such as Microsoft Word.
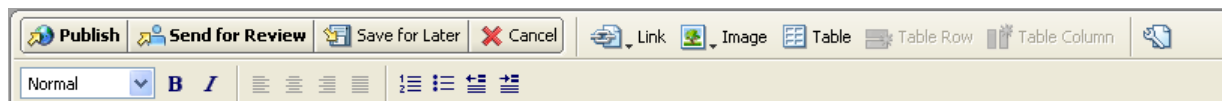

Editable content regions are outlined in blue. Note that some elements of a page, such as included files for headers and navigation, do not display on the page in edit mode. These items are not easily edited in Contribute.

IMPORTING CONTENT FROM WORD

Contribute allows you to import content from a Word document∗. The Word document you import should contain limited formatting (e.g., the document should not contain green headers and purple text) because some of the formatting will not be imported into Contribute.

In-Class Activity

1. Click on the Edit Page button.

2. Select the word "Content" in the main content area of the template.

3. Choose Insert > Microsoft Office Document.

4. Locate the Word document on your computer and double-click on it.

5. In the Insert Microsoft Office Document dialog box, **choose Insert the Contents of the Document Into This Page and click OK.** The content of the Word document is imported into your Web page.
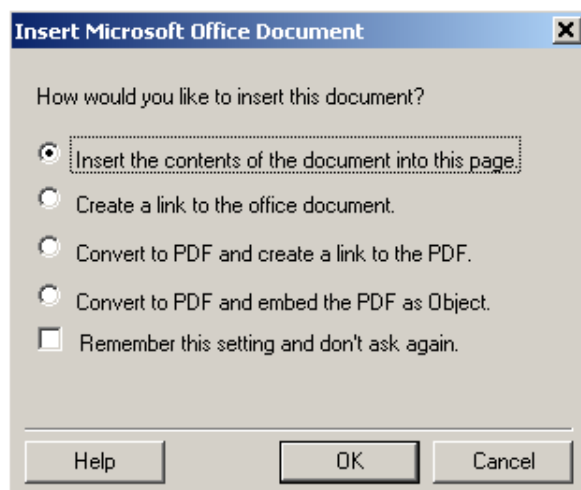


The Insert Microsoft Office Document dialog box

6. When prompted to resize the image, **click "Yes"**. The image in the imported document exceeds the margins of the content area we are importing into.

7. You are prompted to supply a description of the image. **Type "Jane Smith, RN, of the Neonatal Unit at Strong Memorial Hospital."**

∗ In CS3, this feature is available to PC users only. Mac users can open a Word document in Text Edit and copy and paste content into Contribute.

FORMATTING A PAGE

In the second row of options on the edit toolbar, you will see a pulldown menu immediately below the Publish button that by default will say "Normal." This is the Style pulldown menu. Styles can be used to format your text and will vary from template to template.
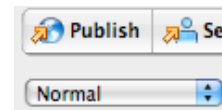
Using headings: Each page should have one main heading that describes concisely the content to follow. As much as possible, you should use relevant key search terms in your first heading to boost your ranking in search engines. The Heading 1 style should be reserved for this first heading. Thereafter, subheadings should use Heading 2, sub-subheadings should use Heading 3, and so on. This creates a consistent look to all your pages.

In-Class Activity

1. We can apply a heading style by selecting the text to format and choosing a heading style from the list. **Select the words "Contact Us". From the Style pulldown menu, choose Heading 2.** Now, remove the bold formatting that was added in Word by **clicking on the Bold button** on the edit toolbar.

2. Because headings should include search keywords that describe the content to follow, the current Heading 1, "Our Unique Presence," is not a good heading for this page. **Change the Heading 1 to "Patient Care, Education and Research."**

INSERTING AND FORMATTING A TABLE

Tables should be used for tabular data only, not for layout of content. Tables consist of rows and columns. Some tables may use a header row or column with data labels that describe the content below or next to them. In HTML, spacing can be applied to different aspects of the table: The border, cell padding, and cell spacing. In the new URMC template, spacing and borders is handled automatically with stylesheets. If you are using an older template, however, you may want to modify these features.

In-Class Activity

Modify an existing table:

1. **Scroll down** to the table in our practice page.

2. **Select the first row of the table by clicking and dragging across** it to highlight it. This will become our header row.

3. **Right-click on the table. Then choose Table Cell Properties, and select the Header Row check box.**

4. **Change the alignment to Center. Click OK to accept these changes.**

Insert a new table:

1. Place your cursor in the space after the table in our practice page.

2. **Click on the Insert Table button** on the edit toolbar. Then, choose the number of rows and columns you need from the Insert Table dialog box.
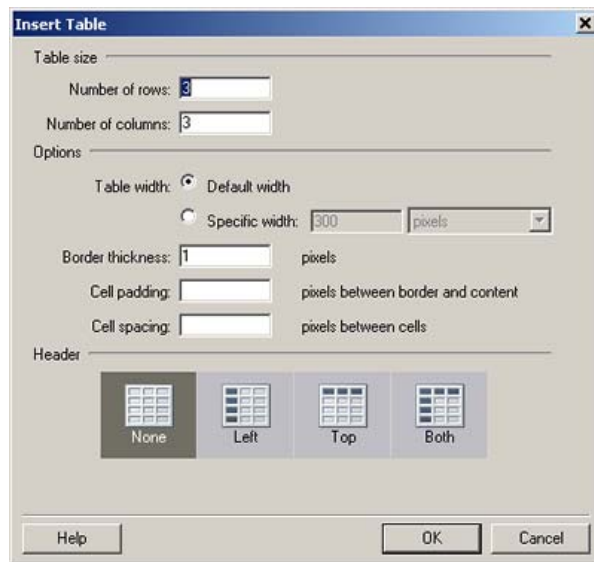
The Insert Table dialog box

3. Enter values for border thickness, cell padding, and cell spacing.

4. Choose a header row style for your new table if you will be using headers. **Click OK.**

5. Preview your page in the browser by **pressing [F12] or choosing File > Preview in Browser.** (**Note:** The Preview in Browser feature is not available if you are assigned to a Writer role.)

CREATING BULLETED, NUMBERED, AND DEFINITION LISTS

Sometimes you'll want to present content in the form of lists. You will want to use a bulleted list for unordered information (e.g., items to bring for your hospital stay) and a numbered list for ordered information (e.g., steps to register for a class). A definition list is great for formatting FAQs. In the latest URMC template, the definition list is automatically formatted with this in mind using stylesheets.

In-Class Activity

1. To create a bulleted list, **add the following lines of text and then highlight them:**

   > Learn more about our services.
   > View CNN home page.
   > Contact us at our email address.
   > Read the current edition of our newsletter.

2. **Click on the Bulleted List button on the edit toolbar.** Your content is now a bulleted list.

3. **Click on the Numbered List button** to change your bulleted list to a numbered list.

4. To create a definition list, with your content selected, **choose Format > List > Definition List.** Notice that the first and third lines are formatted differently now. These would be the questions or definition terms and the second and fourth lines are the answers or definitions.

ADDING LINKS

Links can be part of your navigation file or occur in the content area of your page. The current URMC template on public sites uses a single file called an "includes" file to manage local left-hand navigation for each site. If you are using the current URMC template and need to add or change a link in your navigation, it is best if you contact Web Services to make the change for you, as the includes file is not easy to edit in Contribute. **Always make sure that the text you link accurately describes the page you will be linking to, and use relative search keywords wherever possible.** Using link text like "click here" or "learn more" does not improve your ranking in search engines.

If you will be linking to a site not on our servers, or if you are linking to a page where you lose your site's navigation, such as a PDF, you will want to use a new window target in your links.

Contribute allows you to create links to other web pages within your site, outside your site, to an email address, or to a document, such as a PDF or Word document.

In-Class Activity

Add an Internal Link (link to another page in your site):

1. In the list we added in the previous exercise, **go to the first line and highlight "our services."**

2. **Click on the Link button on the edit toolbar and choose Browse to Web Page**. You can also right-click and choose Insert Link. The Insert Link dialog box is displayed.
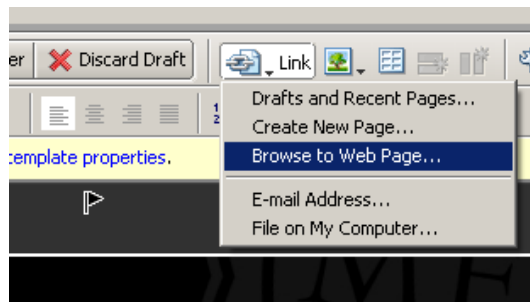
3. **Click on the Choose button.** The Choose option allows you to choose a file from the URMC site you have been given access to edit.
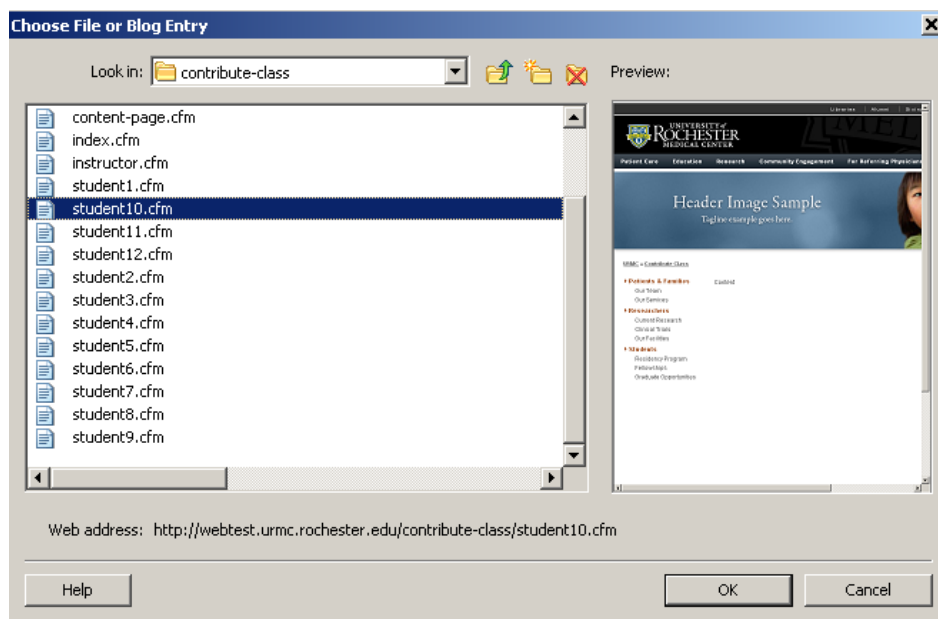

4. **Locate another student file and double-click on it.**

5. **Click OK twice.** The link is created.

Link to an External Link (website that is not on the server you are working on):

1. In the second line of our list, **highlight "CNN home page."**

2. **Click on the Link button and choose Browse to Web Page** (or right-click and choose Insert Link). The Insert Link dialog box is displayed.

3. **Type "http://www.cnn.com" into the Web Address text box and click on the Refresh button to get a current preview of the site.** Previewing confirms that you entered the address correctly.

4. Because this is an external site, you will want the link to open in a new browser window. **Click on the Advanced options tab and choose New Window from the Target Frame dropdown.**
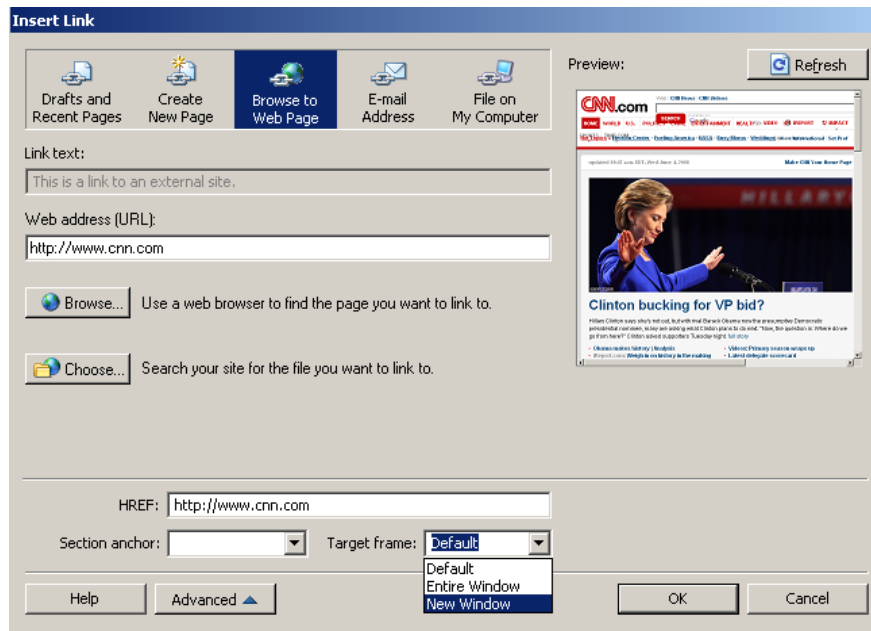
5. **Click OK.** The link is inserted.

6. **If desired, while your cursor is positioned in the link, add the "link-external" style** to your link. This will cause a graphic to display that indicates that the link is external to the present site.

Insert an Email Link:

1. In the third line of the list entered in the earlier exercise, **highlight "our email address."**

2. **Click on the Link menu item and choose E-Mail Address.**
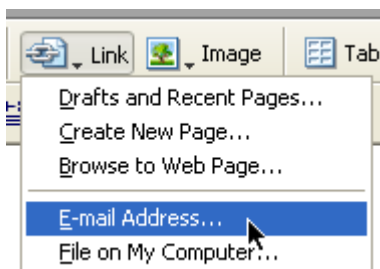
3. **Type your e-mail address in the e-mail Address text box. Make sure there are no spaces in the address. Click OK.** The text is now a link. When a user clicks the link, it will initiate whatever email application has been defined as a default on the user's computer.

4. **With your cursor positioned anywhere in the email link, choose the "link-email"** style from the Style pulldown menu. This will cause a graphic to display to indicate this link is an email address.

Link to a File:

1. In the fourth line of the list entered in the earlier exercise, **highlight the words "our newsletter."**

2. **Click on the Link menu item and choose File On My Computer**. The file we will be using has been saved to the desktop of your computer in the class-files folder.

3. In the Insert Link dialog box, **click on the Browse button.**

4. **Locate the file called "newsletter.pdf" on your desktop in the "class-files" folder and double-click on it.** Note: Do not include spaces in your PDF or Word files—separate words with hyphens in your filenames.

5. It's a good idea to have these documents open up in a new browser window, so **select New Window from the Target Frame dropdown.**
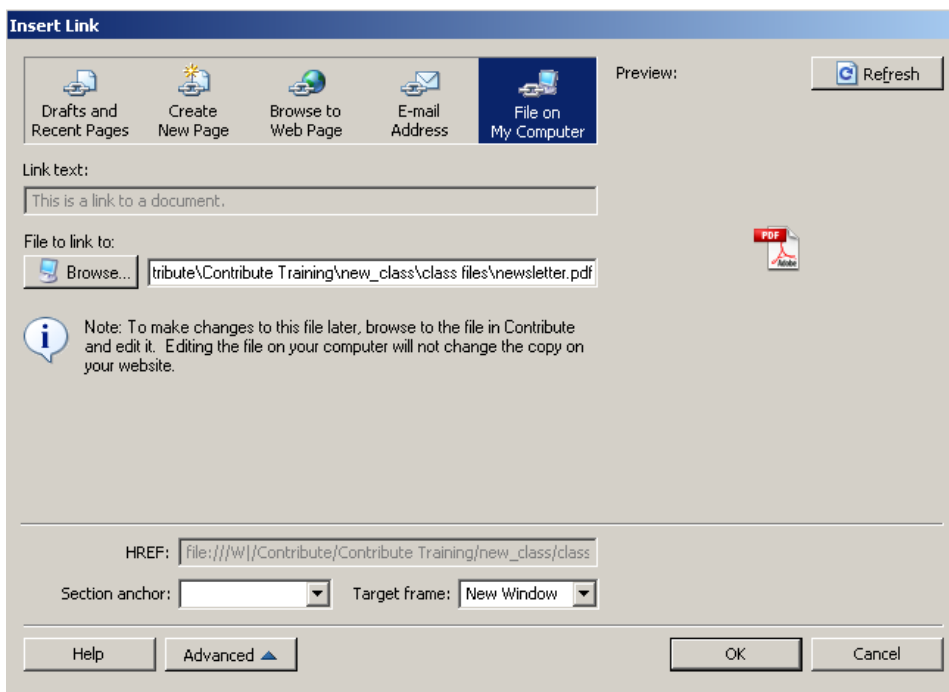
6. **Click OK.** If a dialog box is displayed, **click OK again.** The link is created and the document will be uploaded to the server once you publish the page. Contribute is configured to store this file in a folder called "documents" that resides in the same folder as the file to which you just added the link.

7. **With your cursor positioned anywhere in the newsletter link, choose "link-PDF"** from the Style pulldown.

Note: Right-clicking on any link will give you the option to remove the link.

INSERTING AN IMAGE

You can add images to your web page using Contribute's Image menu item on the edit toolbar. When you insert an image and then publish the page, the image will automatically be saved to the server in an images folder located in the same folder as the file you just published. The image file formats we recommend that you use on your web pages are JPEG (for photographs and images with continuous tone) or GIF (for line art, such as illustrations).

In accordance with the Americans with Disabilities Act, you should use alternative descriptions of images. This description is used by screen readers and by those visitors with non-graphical browsers, and has a limit of 250 characters. Description text should contain meaningful words, not abbreviations that are not universally understood. Use search keywords as much as possible. Do not use ALT text such as "pretty photo" or "happy face." Be specific, for example: "Graph showing increase in NIH funding."

In-Class Activity

1. **Place your cursor in the space before the list created in earlier exercises.**

2. **Click on the Image button.** We'll choose an image that's located on our local computers, so **choose From My Computer.** (Note: If the image is already part of your site, you would choose From Website.)
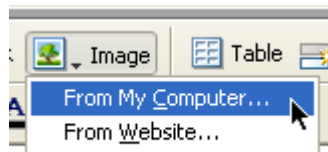

3. **Browse to the Class-Files > Images folder located on the desktop. Select one of the images.**

4. You are prompted to supply a description of the image. **Type an appropriate description into the ALT text field.** Remember to use search keywords and be specific.

5. **Click OK to insert the image.**

6. Apply a style to the image to align it. **From the Style pulldown, choose "img-right"** (float image to right, no border) or "imgFrameRight" (float image to the right, with border). If you are using an older template, you may use one of the "imgContainer" styles to apply alignment.

7. Next, edit the image imported from our original Word document in the first exercise. R**ight-click on the image and choose Image > Properties.**

8. **Select Right or Left from the Alignment dropdown to align the image.**
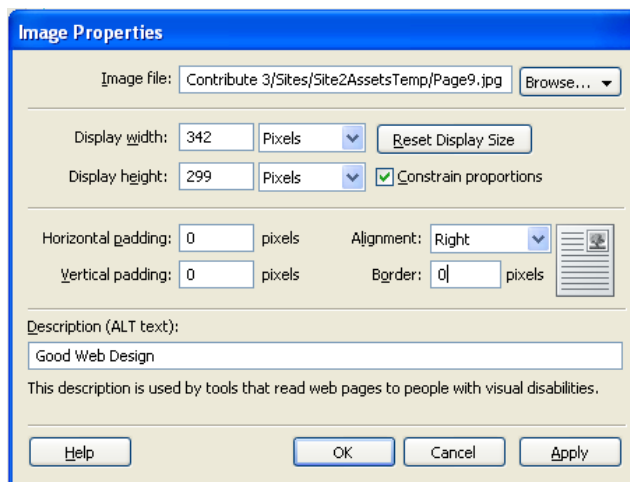
9. **Click OK.** Notice that the next section heading wraps around the image. **To reset the alignment, place your cursor in the heading and choose the "clear" style from the Style pulldown.**

10. **To edit the image, while the image is still selected (indicated by a blue outline), choose Format > Edit Image or right-click on the image to bring up image editing options**.

11. **Crop the image by choosing Crop and move the handles (squares around the image's edges) until you have excluded unnecessary areas of the image.**

12. **Double-click within the image to crop or press Enter**. The image is now cropped.

13. **Resize the image by going back into the Edit Image mode and this time choosing Resize**. **Drag the handles on the corners to resize the image proportionally.** Note that cropping and resizing images does affect the image that is saved to your site, so do this only for your own images, not images used from other sites.

14. **Press Enter to accept changes.**

CHANGING/ADDING A PAGE TITLE

The page title appears in the title bar of your browser; the title does not appear on the page itself. It also appears in bookmarks. Page titles are used by search engines for ranking purposes. On URMC public sites, we are using the convention of using specific descriptions of pages (usually identical to the Heading 1 of the page) followed by more general information about the site. This is because page titles are truncated in bookmarks after 20 characters or so, leaving the most specific part of the bookmark visible.

**Note:** Giving a page a title is not the same as giving it a filename.

In-Class Activity

1. C**hoose Format > Page Properties.**

2. **Type "Patient Care, Education and Research – University of Rochester Medical Center".**

SAVING, SENDING FOR REVIEW, AND PUBLISHING LIVE

When you're done editing your page, you have a few options for saving your changes: Save for Later, Send for Review, and Publish.

Use Save for Later to save your draft to work on your draft another time. **Note that drafts in your pages panel are saved on your local drive.** This means that they are not available for editing from another workstation. Also, they will be lost if you get another computer.

Some departments, such as Pediatrics, Neurology, and most Strong Health sites have workflows in place. If you are editing one of these sites, you will not be able to publish your draft directly but will have to send your draft to a designated publisher for review. If you are editing for Pediatrics, you will need to send to Ellyn Tarasuk for review; Neurology writers send to Jim Forrester, and Strong Health editors send to "All users in the 'Administrator' role." (The Administer role comprises the Web Services team.)
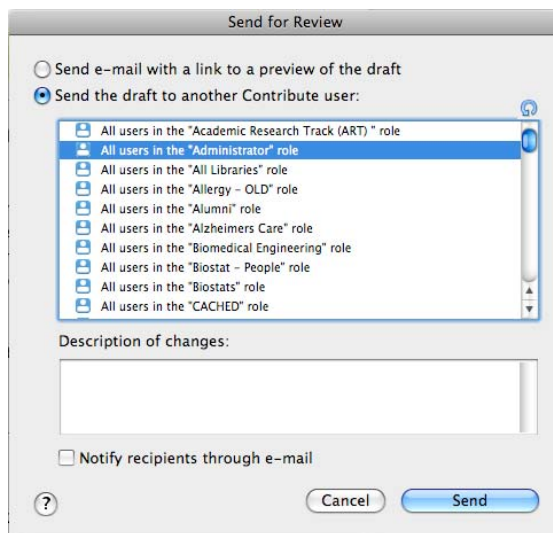
The Send for Review dialog box

In the Send for Review dialog box, you have the option to send the draft to another Contribute user, which will bring up a list of all the Contribute users on a particular website. You can choose your reviewer from the list, and include a brief description of changes made, then click "Send." Do not check the box next to "Notify recipients through e-mail," as it will send the draft notice in duplicate.

You also have the option to send a draft to a non-Contribute user by choosing the "Send e-mail with a link to a preview of the draft" option. The recipient cannot directly edit the draft, but can see the changes and reply with approval or recommendations for further edits. **Note:** This feature is not available if you are assigned to a Writer role.

Publishers can directly publish drafts to the live servers on the URMC public sites. Intranet publishers will have a delay in place, as sites are promoted (made live) at a specific time each day. It's a good idea to test your page in your browser on the live site to make sure your changes went live.

In-Class Activity

1. **Click on the Publish button.** The file is published to the server along with the images and document added to the file. Once your draft is successfully published, your page is displayed in Browser mode once again.

2. **View the page in IE at http://www.urmc.rochester.edu/contribute-class/student#.cfm** (where # corresponds to your filename) to make sure your changes were published.

CREATING A NEW PAGE

Contribute users on public sites are granted the ability to create new pages based on existing pages. Ideally, you should start with a page in the same folder as the one where you want your new page to reside. When you base your new page on a Copy of Current Page, there's no need to specify its folder location on the server. Your page will be placed in the same folder as the page it was copied from. If you require a new subfolder to be added to your site, it is best to request this from Web Services so that the proper navigation and structure can be created.

In the course of creating your new page, you will be asked to name your file. This name will appear in the URL of the page, so make sure it contains only alpha-numeric characters, using a hyphen between keywords, and **does not contain spaces**. The name of your file should make sense when read, within maximum character limits (e.g., "occupational-therapy-staff.cfm"). When you save, you will be warned by Contribute that you still need to link to this new page. Just click OK to save the file.

In-Class Activity

1. In Contribute, make sure you are viewing the student page you edited earlier in class.

2. **Click on the New button (or choose File > New Page).** The New Page dialog box is displayed. **Select Copy of Current Page.**
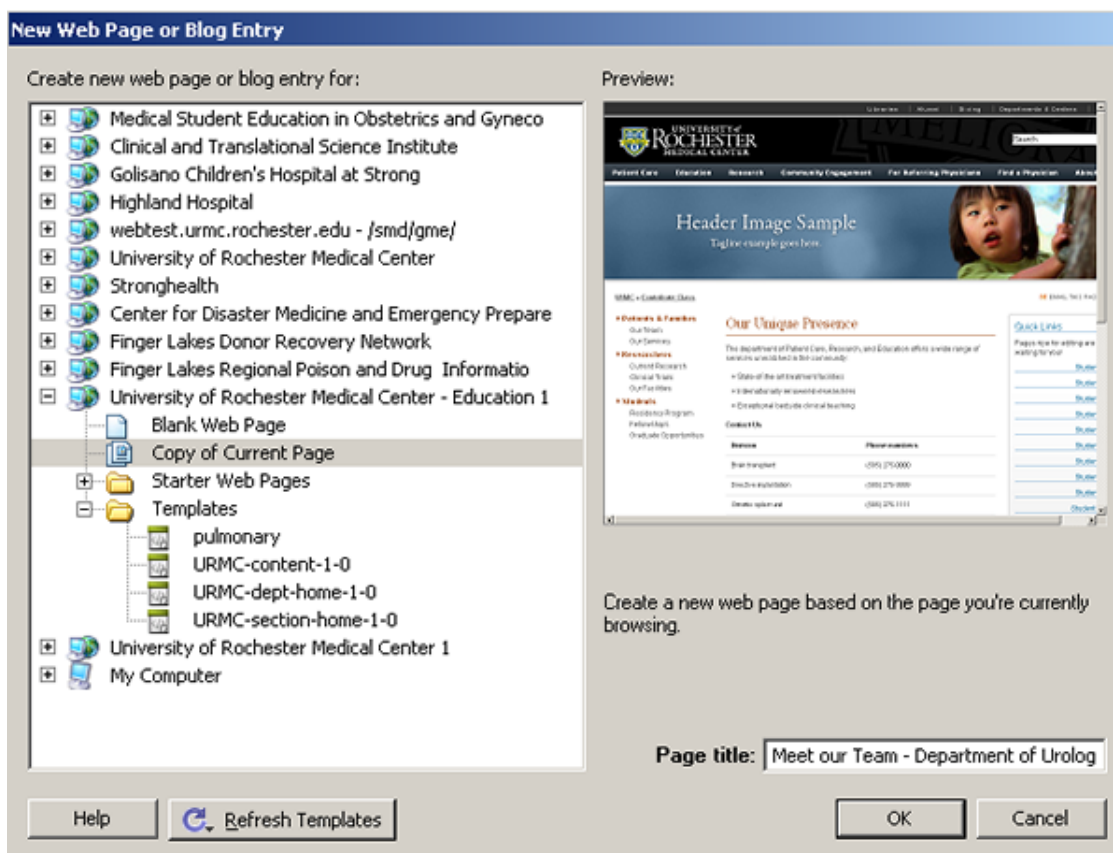
3. **In the New Page dialog box, enter the title, "Meet Our Team – Patient Care, Education, and Research – University of Rochester Medical Center".**

4. **Click OK.** A new page is created and displayed in the edit mode.

5. **Your new page is now created.** It has content from the page you copied, so you will first want to delete that content, editing the first heading to reflect the actual content of our new page (e.g., Our Team). Then you can add your new content. If you are copying from another source, paste your content below the heading.

6. **Click Publish. Name the file "our-team.cfm."** Click OK at the prompt to save the file.

7. **Add a link the new page from an existing page in your site.** DEMO: Go to page edited earlier, add a text link to new page, click Choose, then choose the new page from the site hierarchy.

ROLLING BACK

Once you click on the Publish button, your edits are saved. You have the option, however, to restore a previous version of a page. In Contribute, this is referred to as a "roll back." You can roll back to up to 3 previous versions.

In-Class Activity

1. Go to the student page that you were working on earlier.

2. **Choose File > Actions > Roll Back To Previous Version.**

3. In the Roll Back Page dialog box, **click on the rollback version that has just the word Content in it**. Note that a preview of the version is displayed in the Preview Pane. Always check the Preview Pane to verify the version you're rolling back to is the version you want.

4. **Click Roll Back**. Subsequent changes have now been replaced by the older version on the development server ONLY.

5. **Click Edit Page and then click Publish**. Click OK and your rolled-back version is now on the live servers.

CREATING A BOOKMARK

Like Internet Explorer, Contribute allows you to create bookmarks to frequently accessed sites. This is especially handy if you need to edit two different sections on the same site and navigating back and forth between them is cumbersome. You will need to create a bookmark in Contribute if you have access to two different folders or sites in Contribute, or if you want quick access to pages you edit frequently within one site.

In-Class Activity

1. **Browse to the page you want to bookmark.**

2. **Select Bookmarks > Add Bookmark. Rename if necessary.**
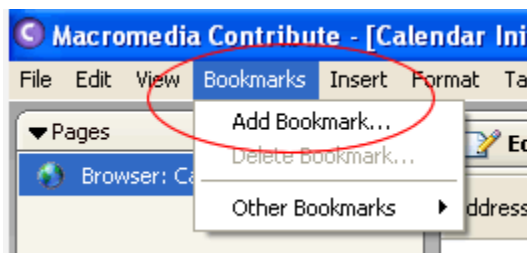
3.   **Click OK.**

4.   To access the bookmark you created, **select Bookmarks > [*Name of New Bookmark*].**

DELETING PAGES

Your Contribute Administrator may have given you permission to delete files. Before you delete, remember that deleting a page or image can result in a broken link. Make sure that you have thoroughly checked for referring links before removing a page.

To delete a published page, you can browse to the page in Contribute's browser mode, and **choose File > Actions > Delete Page** from the main menu. However, this only deletes a page from the development server. To also remove the page from the live server, you will have to file a request through the appropriate ticketing system.