Parliamentary and Health Service Ombudsman

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

CHANGE LOG	
Date last updated	**Last updated by**
December 2018	
April 2019	
Feb 2020	
March 2020	

Contents

Logging in to the system

Adding a blog post

1 Once you have a logged in you will see this screen:

2 Press **Manage** in top left corner. This will reveal a second menu:

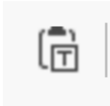
3 Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4 Hover over **Add content** and scroll down and click on **Blog**.

5 You will presented with this screen:

6 Fill in the **title**.

7 In **body** enter your text. To paste your text into the body area press the **text icon** in the tool bar as shown below:



8 A pop up box will then appear, **paste the text from your file** in to this and press OK:

9 Format your text as appropriate. Make sure the headings are in sequence. For example: the title will be Heading 1, Heading 2 for a subheading. etc. This is to follow accessibility standards. Headings styles are found under the **norma**l button on the tool bar.

10 **To be aware:** the first paragraph in the body text will be displayed in the Blog listing. If this text isn't suitable for the listing page, add a summary separately by clicking on **Edit summary**.

This will reveal a separate summary section for you to add a separate summary if needed:

11 If you need an image for your blog you can add one image to the **top banner and to the blog listing page**. Under ‘blog header’ select a relevant image for blog post. Choose the same image for the list image.

If you need any help with images please contact the digital team.

The size for a banner blog image is 1170px x 375

The size for a listings blog image is 3000px x 2000px or 1170px x 780px

When you have added your image the screen will look like this:

12 **Add alternative text** to explain images to people who can’t see them, for example ‘Woman looking at a computer screen’.

13 You can also crop the image to a specific area if you wish by selecting the **Crop image** option:

This principle works for list image as well.

14 If applicable, add any relevant keywords in the **META** section in the right hand side menu on the blog editing page. This will help when people search for words or phrases in Google which aren't in the text. Separate them with commas.

15 If you are uploading a blog on behalf of someone else go to **AUTHORING INFORMATION** section in the right hand side menu on the blog editing page.

All blogs should have authors. Type the authors name in the **authored by section** using initial and then surname. If the author doesn't come up in the list, ask a member of the Digital team to add him or her. Their job title and picture will be added automatically when the page is produced. The authoring date is the date you create the post.

16 Finally press the **Information** tab.

17 Select **None** for a standard blog page. (HR is for Employee stories.) Add the **date** of publication.

Also please link to any related web pages in the related pages section.

18 Press **Save as and set to unpublished**

19 You will then be presented with a screen that shows how it will look on the website:

20 Check content for formatting, typos or grammatical errors. Check that links work.

21 If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save as and set to unpublished** button.

22 Once you are happy with your page email the digital team to make your page live if you don't have permissions to this yourself.

Editing an existing blog post

1. If you want to edit an existing blog entry, press **Content**.

2. You will then see this screen, which is the **Content** screen:

3. Look for your content using the search section, by using **content type** select Blog:

4. Then press **filter**:

   This will then list all the blog posts, and where you will find your blog page to edit.

5. Click on the title of the blog you wish to edit:

Adding a News post: including press releases, media statements and corporate news

1 Once you have a logged in you will see this screen:

2 Press **Manage** in top left corner. This will reveal a second menu:

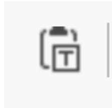
3 Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4 Hover over **Add content** and scroll down and click on **News post**.

5 You will presented with this screen:

6 Fill in the **title** for your story:

7 In **body** enter your text. To paste your text into the body area press the **text icon** in the tool bar as shown below:



8 A pop up box will then appear, **paste the text from your file** in to this and press OK:

9 Format your text as appropriate. Make sure the headings are in sequence. For example: the title will be Heading 1, Heading 2 for a subheading. etc. This is to follow accessibility standards. Headings styles are found under the **norma**l button on the tool bar.

10 The first paragraph should be **lead text**. This option is found under the **style** drop down button on the tool bar.

11 To add a quote to your article highlight your text and press the quote button in the tool bar as highlighted below:

Quotes start with big orange quote mark. End with standard single quote mark ….’.

If the quote includes more than one paragraph, open each new para with a single quote mark and end the whole quote with a closing quote. As shown below:

12 If you use Notes to Editors in your article the heading should be styled as **bold.** This section is separated from the body copy by a grey line above and below the text. To add a line, press the **line** button in tool bar as shown below:

13 In the **information** area under **date** put the date of posting.

14 You need to choose which section your article sits on the website. There are three sections for articles in the **Category** area, ‘corporate news’, “media statements’ and ‘press releases’. Select the one that is suitable.

15 Ignore the sections on images – these are not needed for this type of content.

16 Finally if you have any related content you’d like to link form your article, press the **Related content** tab:

Here you can optionally add a report which will appear in a card on the side bar of the page. If you type in the space under **related report** the title of the report it will automatically search for the report. Select the one you want to use:

You also add pages from the website that are related to the article in the **related pages** section. Again by typing in the name of the page the system will automatically search for you:

17 Press **Save as and set to unpublished**:

18 You will then be presented with a screen that shows how it will look on the website:

19 Check content for formatting, typos or grammatical errors. Check that links work.

20 If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save as and set to unpublished** button.

23 Once you are happy with your page press **Save and publish** to make it live, or email the digital team if you don't have permissions to this yourself.

Adding a Job post

1 Once you have a logged in you will see this screen:

2 Press **Manage** in top left corner. This will reveal a second menu:

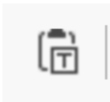
3 Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4 Hover over **Add content** and scroll down and click on **Job**.

5 You will be presented with this screen:

6 Fill in the sections for **Title (job title), Closing date, Length of contract, Salary** and **Location**.

7 To add text to each of the sections you need to press the **text icon** in the tool bar as shown below:



8 A pop up box will then appear, **paste the text from your file** in to this and press OK:

9 In the first main section **About us** add this standard text**:**

We are the final stage for complaints about the NHS in England and public services delivered by the UK Government. We look into complaints where someone believes there has been injustice or hardship because an organisation has not acted properly or fairly or has given a poor service and not put things right.

Our service is free for everyone.

10 In the second section add the text for the job information under **about our role** using the text paste instruction from number 3.

11 In the third section **How to apply,** add the relevant information, again using the text paste instruction from number 3.

12 If necessary add any further text in **Body** – using the paste instruction from number 3.

13 Format your text as appropriate. Make sure the headings are in sequence. For example: the title will be Heading 1, Heading 2 for a subheading. etc. This is to follow accessibility standards. Headings styles are found under the **normal** button on the tool bar.

14 In the **Apply link** section add the **URL** for the e-recruitment site page, and the text which is used for the link in **link text.**

15 On right hand side menu open **META** and add any relevant keywords. Only add words or phrases that people might search for in Google which aren’t in the text. Separate them with commas.

16 Press **Save as and set to unpublished** unless you have publishing rights:

17 You will then be presented with a screen that shows how it will look on the website:

18 Check content for formatting, typos or grammatical errors. Check that links work.

19 If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save as and set to unpublished** button.

20 Once you are happy with your page press **Save and publish** to make it live, or email the digital team if you don't have permissions to this yourself.

Editing an existing job post

1. If you want to edit an existing blog entry, press **Content**.

2. You will then see this screen, which is the **Content** screen:

3. Look for your content using the search section, by using **content type** select job:

4. Then press **filter**:

   This will then list all the blog posts, and where you will find your blog page to edit.

6. Click on the title of the job you wish to edit, edit your page and then work through the publishing steps as before:

Adding a FOI disclosure release page

1 Once you have a logged in you will see this screen:

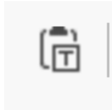
3. Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4. Hover over **Add content** and scroll down and click FOI disclosure:

5 You will be presented with this screen:

6 Fill in the **title** of the document. Keep it short and self-explanatory – use words people might search for:

7 In **body** enter your text. To paste your text into the body area press the **text icon** in the tool bar as shown below:



8 A pop up box will then appear, **paste the text from your file** in to this and press OK:

9 Format your text as appropriate. Make sure the headings are in sequence. For example: the title will be Heading 1, Heading 2 for a subheading. etc. This is to follow accessibility standards. Headings styles are found under the **normal** button on the tool bar.

10 Add the disclosure reference number under **Reference Number** and put **Date** of disclosure in the date box.

11 Add any **related files**. Click on **Chose files** to a new file or choose an existing file.

To note for file names:

- Make sure that file you upload has a sensible file name, starting with a capital letter and with words linked by underscores. For example:

  Annual_report_2016-17.pdf

- Any non-HTML links should open in a new window.

12 You’ll be presented with this screen:

To add new files from your computer click on **Choose File** – this will open a window to let you choose a file from your computer.

13 Select your file and it will return to this screen with file showing. Select **upload:**

14 This will update the window – click on **Use selected files** to upload your file.

15 Your file will appear in the Related files section – add a file name in the **Description:**

16 On right hand side menu click **META** and add any relevant keywords into eh **keyword section**. Only add words or phrases that people might search for in Google which aren't in the text. Separate them with commas.

17 Press **Save as and set to unpublished**:

18 You will then be presented with a screen that shows how it will look on the website:

Check content for formatting, typos or grammatical errors. **Check that links work.**

19 If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save as and set to unpublished** button.

20 Once you are happy with your page press **Save and publish** to make it live, or email the digital team if you don't have permissions to this yourself.

Adding a new page to the website

1 Once you have a logged in you will see this screen:

2 Press **Manage** in top left corner. This will reveal a second menu:

3 Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4 Hover over **Add content** and scroll down and click page:

5. You will be presented with this screen:

6. Fill in the **title**. Keep it short and self-explanatory – use words people might search for. Click ‘**Hide from menu’**.

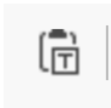
7. Then on the right hand side, click on **MENU SETTINGS**. Tick the ‘Provide a menu link’ check box. The title should appear.

8. Find the area in the website you want this page to sit under using the drop down arrows.

9. In the main section do not any text in the Introduction – and make sure that ‘Introduction layout’ is set to **none**.

10. Click on ‘**Primary content’** tab.

11. In **body** enter your text. To paste your text into the body area press the **text icon** in the tool bar as shown below:



12. A pop up box will then appear, **paste the text from your file** in to this and press OK:

13. Highlight your first sentence or short paragraph as '**Lead text'** under '**Styles**'.

14. The rest of your text will usually be ‘Normal’ under ‘Formats’.

15. You can make the Body box bigger by clicking on the maximize/full screen icon.

16. Format your text as appropriate. Make sure the headings are in sequence. For example: the title will be Heading 1, Heading 2 for a subheading. etc. This is to follow accessibility standards. Headings styles are found under the **normal** button on the tool bar.

17. If you need to add a table click on the **table icon** in the tool bar. Make sure that your table is formatted the same way as on other pages for consistency (see page xx for tables).

18. Include relevant links in your content. To make a link, highlight the word or phrase to be linked click on the **chain icon**:

19. A pop up window will appear. The text you highlighted will appear in the Display text box. Add the URL of the page/file to be linked to in the **URL** box.

20. Under '**Related content'** tab, add any related files. Upload a new file or choose an existing file. Make sure that file you upload has a sensible file name with words linked by underscores. Add a descriptive file name, starting with a capital letter (and no underscores). Use lower case for the descriptive file name unless grammar requires otherwise.

21. Or link to related pages – using **Related Links** also under ‘Related content’. Start typing the title of the page under URL and pick your page. Add **link text** – this is the text that will appear as your link.

22. In the introduction tab you can add a banner image (eg for monthly statistics), add it as **Header image** – ask the digital team for help to produce a graphic.

23. Once you have uploaded the image add **Alternative text** under the image to explain to people who can’t see the picture what it represents. Use suitable search keywords if appropriate.

24. On right hand side menu open META and add any relevant keywords in the **Keyword box**. Only add words or phrases that people might search for in Google which aren't in the text. Separate them with commas.

25. Press **Save as and set to unpublished** unless you have publishing rights:

26. You will then be presented with a screen that shows how it will look on the website:

Check content for formatting, typos or grammatical errors. **Check that links work.**

27. If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save as and set to unpublished** button.

28. Once you are happy with your page press **Save and publish** to make it live, or email the digital team if you don't have permissions to this yourself.

Adding a Publication page

Includes reports about NHS, Reports about government, consultation responses, corporate publications and Research publications

1 Once you have a logged in you will see this screen:

2 Press **Manage** in top left corner. This will reveal a second menu:

3 Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4. Hover over **Add content** and scroll down and click publication:

6. You will be presented with this screen:

7. Fill in the **title** – this is normally the name of the report/publication. Keep it short and self-explanatory – use words people might search for.

8. In the **Introduction** box insert a line briefly explaining the document

9. In the **Body** section put short summary identifying the document and its theme.

10. In the related files section press the **Choose files** button – this is the option which uploads your file.

11. This will open a new window. Press the '**Add new files'** button then the **choose files** option. If it has been uploaded before then press the 'Choose existing files' option.

12. This will open a window to let you choose a file from your computer. Select your file and it will return to this screen with file showing. Select **upload:**

13. This will update the window – click on **Use selected files** to upload your file.

14. Your file will appear in the Related files section – add a file name in the **Description.** Keep it short and to the point and follow the file naming guidance (see Uploading files page)

15. In the **Information** tab in the **Type** box start typing in the kind of report you are uploading. These are labelled as follows – Reports about NHS, Reports about government, Consultation responses, corporate publications or Research. Select the appropriate category for your publication.

16. Add a **post date** for when the report will be published:

17. If you have an image to accompany the publication click on the **image** tab the digital can help format an image for you.

18. To add an image press on Choose file in images section:

19. This will open a window to let you choose a file from your computer. Select your file and it will return to this screen with file showing. **Add alternative text** to explain images to people who can't see them, for example 'Annual report cover 2017-18.

20. You can also crop the image to a specific area if you wish by selecting the **Crop image** option:

21. On the right hand panel open the **Meta** drop down section by clicking on the arrow. In the **keywords** section add words or phrases that people might search for in Google which aren't in the text. Separate them with commas.

22. On the right hand panel open the **Authoring information** drop down section by clicking on the arrow. Fill out the information as applicable.

23. Press **Save and set to unpublished** unless you have publishing rights:

24. You will then be presented with a screen that shows how it will look on the website:

Check content for formatting, typos or grammatical errors. **Check that links work.**

25. If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save and set to unpublished** button.

26. Once you are happy with your page press **Save and publish** to make it live, or email the digital team if you don’t have permissions to this yourself.

Adding a multi-page publication

1. Follow the instructions of ‘Adding a page to the website’ on P54.

2. Fill in the **title**. Keep it short and self-explanatory – use words people might search for. Click ‘**Hide from menu’**.

   But also click on **Make this page and its children a report** – this is really important as this links the pages of the publication together.

3. As an example here is the first page of a multi-page report. This is used as a summary page – here you can add other digital elements such as graphics, video and related files. The DVLA report is a good example:

4. To be able to produce a multi-page publication you must now create a publication page and link it to the page you have created. The title of your first page will be the link to the publication page.

5. Create a publication page as per the instructions on page 70. **Add the title** of the page you have just created for the report to the **Report** box.

   This will link the pages and create the multi-page option.

6. Once you have created your publication page **Save and set to unpublish**

7. You will need to build the pages of the publication - this is done using the Adding pages process. The first page will be your summary page as mentioned in step 3.

   Use the same process as shown in **Adding a page** section on P54.

8. Upload any related files (this process can be found on page 64).

9. On the right hand panel open the **Menu settings** drop down section by clicking on the arrow. And then click on the **Provide a menu link** box.

10. Add the title of the publication in the **Menu link title** box.

11. **Save and set to unpublish.** You will then be presented with a screen that shows how your first page will look on the website:

12. To add further pages to the publication you will need to create another page – each page is a chapter of the publication. So if you have 5 chapters you will have to create 5 pages. Use the same process as shown in **Adding a page** section on P54.

13. However, when you create these pages time **don't click** on **Make this page and its children a report**. You will need to link the page to the main report by selecting the area you wish the page to go. You going to grey panel on the left and by clicking on the **Menu settings** arrow which will reveal a site map at the bottom:

14. Click on the section you wish to place the page and a green arrow will appear:

15. This will then place the page in this section. Press **Save as and set to unpublished**.

16. Repeat these steps until you have all your pages complete Check content for formatting, typos or grammatical errors. **Check that links work.**

17. Once you are happy with your page press **Save and publish** to make it live, or email the digital team if you don't have permissions to this yourself.

Fixing menu issue - multi-page publication

1. Navigate to the menu navigation:
   Structure > Menus > Main Navigation
   Link:

2. To find your page in the menu navigation press **'CTRL F'**. A **'find'** box will appears on your computer screen. (The box will appear top left of your computer screen if you use Internet Explorer, bottom left if you use Firefox, top right if you use Chrome).

3. Type your page title in the **'find'** box. This should highlight the page.

4. Drag to **re-order** the subpages.
5. Click **save** at the bottom of the page. This should update the multi-page menu.

Mailing-list (Downloading results)

Only ‘ ’ have permissions to download results.

1. The mailing-list results can be accessed once logged into the CMS here -

2. The default settings on this page should be fine to download the results. However if you would like more options. You can select more option under the **‘column options’**.

3. Clicking the (blue) **‘Download’** button at the bottom.

Video general guide on how to manage, review and export a form's submissions on Drupal: https://www.youtube.com/watch?time_continue=46&v=DUO54Suz-3A

Adding a URL redirect

Configuration » Search and metadata » Redirect

Click on **Add redirect**

In **Path** th

In **To** (add the new URL path)

3. From the **Redirect status** drop-down box, you can select which status will be used. Most of the time it'll be a 301 or 302. Once you're finished click on **save**.

4. You'll be redirected back to the Redirect page where you can manage existing redirects and create new ones.

Adding a video and embedding a video link into content

To embed a video in your content you have to add a code in your content. First you need to upload a video to the website.

1. Once you have a logged in you will see this screen:

2. Press **Manage** in top left corner. This will reveal a second menu:

3. Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4. Hover over **Add content** and scroll down and click on **Video**.

5. You will be presented with this screen:

6. Add the title for the page in the **title** box, and the video title in the **Video title** box, and a short summary about the video in the video description box

7. In the **Video embed ID** box add the link from where the video is stored on youtube

   You need only copy the information after the equal sign in the youtube link. For example https://www.youtube.com/watch?v=mCCS5Ohji-k you only need to copy **mCCS5Ohji-k**:

8. Check the tick box **Details to bottom** if you would like the title of the video and summary to sit below the video. It will display automatically with this information to the side:

9. Add the length of the time of the video in the **Time of video** box, with a colon dividing minutes and seconds:

10. **Save and set to unpublished**. This will then show you a screen of how it will display:

11. If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save and set to unpublished** button.

1. Once you have saved you video it will be given a video path number in the content database. Go back to the content page and **filter for video**:

2. This will bring up the current list of videos on the website:

3. Look for your video in the list and make a note of its **node number** under the path list.

For example, driven to despair video would be 588

4. In your content you can now add the following piece of code to insert a video into your page. Please note where you add this code the video will added under that content:

   [content:video:**xxx**]

   The three x's are where your **node number** should be placed. For example the Driven to despair video would be:

   [content:video:588]

Adding google chart to the website

Charts are added to the wysiwyg areas as tables and their format chosen using the 'Styles' dropdown.
Currently there is a choice of Stacked, Column, Bar and Pie charts.

- All charts require a table with at least two R*ows* and two C*olumns*
- The *Headers* option is always set to *First Row*
- Other options will not affect the outcome of the chart

Depending on the type of chart you want to create the table of data will need to be formatted slightly differently;

- Stacked charts are similar to Bar but allow multiple bars to be stacked horizontally
    - Data table needs at least two columns, every column after the first will be used for data
    - The first column represents the vertical axis (the names of the stacks)
    - All other columns are data points with their labels positioned to the right of the chart
    - Each row represents one bar within the chart with each column in that row representing a part of the stack
- Bar charts represent data horizontally as 'bars' relating to a given number
    - Data table needs two columns
    - The first column represents the vertical axis (the name of each bar)
    - The second column holds the value of the bar named in the first
- Pie charts represent data as a percentage
    - Data table needs two columns
    - First column holds the segment names
    - Second column holds the segment values
    - Percentage is calculated automatically
    - Segment name labels displayed to the right of the chart
- Column charts represent data vertically as 'columns relating to a given number
    - Data table needs two columns
    - The first column represents the horizontal axis (the name of each column)
    - The second column holds the value of the column named in the first

Once your data table has been created you can select a style (chart type and colour scheme) by clicking once on the table and selecting an option from the Styles dropdown at the top of the wysiwyg.

See the chart test page on the site for live examples:
https://www.ombudsman.org.uk/chart-test

Uploading files

1. Hover over **Content** in the top left corner this will reveal this drop down menu. Click on **Upload file(s)**

2. Once you have a click on **Upload file(s)** you will see this screen:

3. Press the **Choose files** button – this is the option which uploads your doc. It will open a new window.

4. Press the **Add new files** button then the **choose files** option. This lets you locate your document if it has not been uploaded previously. If it has been uploaded before then press the **Choose existing files** option.

5. Press the **Upload** button which will take you back to the main window which now has your document uploaded.

6. Main files window

Extra information:

- We prefer to upload files with file names which have underscores rather than hyphens and only a first capital letter: eg annual_report_and_accounts_2013-14.
- We'd like related files to have display text without underscores eg Annual report and accounts 2013-14. Another example is: **Email Management and Data Storage Policy**. We prefer lower case – unless there's a reason in grammar for uppercase: Email management and data storage policy.
- Where a file name is not very meaningful, make it more helpful if possible. Eg this one: **FDN-223672-CAD-Guidance-General-Guidance-and-Case-Samples.pdf**. If you open the file, you'll see that its heading is: 'Clinical Advice Directorate Guidance notes for the provision of Clinical Advice'. Our preferred style is to use lower case if a word doesn't need a capital letter so this would be: 'Clinical Advice Directorate guidance notes for the provision of clinical advice'.
- Add a descriptive file name, starting with a capital letter (and no underscores). Use lower case for the descriptive file name unless grammar requires otherwise.
- Include the format type and file size (to nearest whole number) in the link eg (PDF 61KB).
- Any non-HTML links should open in a new window.
- Add date – outside of link.
- We don't need the FDN reference number in the display text.
- However, a version number can be useful as in: Investigation manual 6.0.

- A lot of the PDFs are quite specific to FOI disclosures so it's OK for them to be uploaded here but if the FOI is referring to a major and recent publication, it's better to link to the relevant web page on the site (eg our recent annual reports in the last three years or our Principles documents). That also saves us uploading duplicate files. If in doubt, please ask.

- Avoid overlong urls. It's better to put long urls behind a shorter url like: 'similar request can be found at **www.whatdotheyknow.com**.

Style – **names of publications** – if it's a link, don't put it in italics too. Just lowercase with a starting capital letter.

Emergency message on home page

1 Go the home page. Click on 'Edit'.

2 In the Introduction, copy the text at the top right of the home page and save it somewhere safe. It currently says:

We make final decisions on complaints that have not been resolved by the NHS in England and UK government departments and other public organisations.

We do this fairly and without taking sides. Our service is free.

3 Once you have saved it elsewhere, delete it from the home page and put your emergency message in the same place. We recommend the following format.

1 January 2017: We're sorry. Our telephones are down. Please try again later or email us on: phso.enquiries@ombudsman.org.uk.

Or

1 January 2017: We're sorry but our computer systems are down. Please bear with us while we try to fix things.

4 Save the page: 'Save and keep published'.

5 Check that it looks OK. If you have any problems, please contact a member of the Digital team.

6 Please remember to reinstate the original message when the emergency has passed.

Creating tables

1. Make sure that you are logged in.
2. Go to the page that you want to add a table.
3. Click on **Edit**.

4. Place your cursor in the **Body** of the page where you want your table to appear.
5. Click the **Insert/Edit Table** button in the WYSIWYG.

6. A new box will open select how many columns and rows you want in your table, along with the width and height.

7. Once your table has been customised to your preference hit **OK**, and the table will now appear in the Body of the content.

8. Once everything is ready click **save** at the bottom of the page.

9. Changing Properties of your table. Right click when you are inside a table. **This allow you to:**

    - Change the properties of an individual cell
    - Add or delete rows and columns
    - Merge rows or columns
    - Split rows or columns

10. Once everything is ready click **save** at the bottom of the page.

Linking documents within the website

Related files

1. First you will need to upload the document from your computer to the server/website.
2. Ensure that you are logged in and go to the page where you want to add the link to the document.
3. To add the document to the server, scroll down to the bottom section of the page until you find "File Attachments".
4. Click browse, locate the file on your computer, highlight and double click or click open and then "upload". There is a size limit of 10MB.
5. The file will now be listed under File Attachments.
6. The file will then be given a URL that will be located underneath where you have uploaded the file

List content

Adding a card to the website

1. Make sure that you are logged in.
2. Hover over/or press **Content** in the top left corner this will reveal this drop down menu. Hover over **Add content** and scroll down and click **Card**.

You will be presented with this screen:

1. Add the card **Title**
   - This is the title that you will use to find the card in the content library.
   - If it is a Case Summary card please add: (Card: CS – [**Title of the case**].
2. Add the disply **Title**
   - This is the title that will actually be rendered onto the card.
3. Add the URL you would like to link the card to.

4. Add an **image** and **image square** to your card. Not all card types display an image.
5. Add **Alternative text**.
   - Short description of the image used by screen readers and displayed when the image is not loaded. This is important for accessibility.
6. Use the **Crop Image** option to select an area of the image.

Once everything is ready click **save** at the bottom of the page.

Deleting the cache content

1. Log into admin dashboard.
2. On the top menu bar, locate the Configuration option and click on it.
3. This brings you to the main Configuration category screen. ...
4. Once on the Performance screen, look to the button on the screen at the top named clear All Caches.

Adding an event to the events page

Creating an event page

1 Once you have a logged in you will see this screen:

2 Press **Manage** in top left corner. This will reveal a second menu:

3 Hover over/or press **Content** in the top left corner this will reveal this drop down menu:

4 Hover over **Add content** and scroll down and click page:

29. You will be presented with this screen:

30. Fill in the **title**. Keep it short and self-explanatory – use words people might search for. Click '**Hide from menu'**.

31. Then on the right hand side, click on **MENU SETTINGS**. Tick the ‘Provide a menu link’ check box. The title should appear.

32. Find the area in the website you want this page to sit under using the drop down arrows.

Events page area is under news and blogs.

Menu navigation: News an blog > Events > New item

33. In the main section do not any text in the Introduction – and make sure that ‘Introduction layout’ is set to **None**.

34. Click on '**Primary content**' tab .

35. In **body** enter your text. To paste your text into the body area.
36. When you past the content into the editor can you try **Ctrl + Shift + V**

This should trigger the HMTL strip.

37. Highlight your first sentence or short paragraph as '**Lead text'** under '**Styles**'.

38. The rest of your text will usually be 'Normal' under 'Formats'.

39. You can make the Body box bigger by clicking on the maximize/full screen icon.

40. Format your text as appropriate. Make sure the headings are in sequence. For example: the title will be Heading 1, Heading 2 for a subheading. etc. This is to

follow accessibility standards. Headings styles are found under the **normal** button on the tool bar.

41. If you need to add a table click on the **table icon** in the tool bar. Make sure that your table is formatted the same way as on other pages for consistency (see page xx for tables).

42. Include relevant links in your content. To make a link, highlight the word or phrase to be linked click on the **chain icon**:

43. A pop up window will appear. The text you highlighted will appear in the Display text box. Add the **URL** of the page/file to be linked to in the **URL** box.

44. Under '**Related content'** tab, add any related files. Upload a new file or choose an existing file. Make sure that file you upload has a sensible file name with words linked by underscores. Add a descriptive file name, starting with a capital letter (and no underscores). Use lower case for the descriptive file name unless grammar requires otherwise.

45. Or link to related pages – using **Related Links** also under 'Related content'. Start typing the title of the page under URL and pick your page. Add **link text** – this is the text that will appear as your link.

46. In the introduction tab you can add a banner image (eg for monthly statistics), add it as **Header image** – ask the digital team for help to produce a graphic.

47. Once you have uploaded the image add **Alternative text** under the image to explain to people who can't see the picture what it represents. Use suitable search keywords if appropriate.

48. On right hand side menu open META and add any relevant keywords in the **Keyword** box. Only add words or phrases that people might search for in Google which aren't in the text. Separate them with commas.

49. Press **Save as and set to unpublished** unless you have publishing rights:

50. You will then be presented with a screen that shows how it will look on the website:

Check content for formatting, typos or grammatical errors. **Check that links work.**

51. If you need to edit the page click on the **edit** tab this will take you back to the editing page. Remember to save your changes again by using **Save as and set to unpublished** button.

52. Once you are happy with your page press **Save and publish** to make it live, or email the digital team if you don't have permissions to this yourself.

Go to the events page

Click Edit

Click **Primary Content**
Insert a **horizontal link** above the most recent event in the Body.

xample below:

Meet the Ombudsman: Annual Open Meeting 2018

On 22 May 2018, we hosted our second annual open meeting in London.

Ombudsman Rob Behrens shared our new three year strategy and spoke of returning to the core values of an ombudsman service.

Guest speakers included: government complaints champion and HMRC Customs Director General Customer Services, Angela MacDonald and James Titcombe, father of Joshua Titcombe.

After a lively Q&A session, breakout sessions featured discussions on innovation and good practice in complaint handling and alternative dispute resolution.

Find out more

Adding call-to-action buttons to a page

1. Type the text you wish to link

2. Highlighting the text and clicking the **link** button. Entered the URL click ok (the text should turn blue)

3. Use the ‘**Styles’** drop down at the top of the wysiwyg and select the **Button** style. The link should now change in appearance.

Embedding YouTube videos on content pages

1. Go to > **Content** > **Add content** > **Video**

2. Complete the required fields most importantly the **Video embed ID**: The ID used by YouTube to identify this video.

3. Generally this can be found **after 'watch?v='** in the video's URL, for example the video ‘Meet the Ombudsman’ ID can be found; https://www.youtube.com/watch?v=**MgQ9H3_Wipg** has the ID **MgQ9H3_Wipg**

4. Click **Save**

5. If you then go to the content view (Content) you should be able to see your video content type in the list (see screenshot below).
6. Make note of the ID in the path field – in the example below it would be **1307**

7. Go to the page that you wish to add the content to and select the **Primary Content** area (see screenshot below).

8. Type in the text ***[content:video:xxxx]*** In each instance replace the ***xxxx*** with the node ID – in the instance below its ***1307***. The video will appear wherever the ***[content:video:xxxx]*** code is added

9.

10. Click **Save, Publish** or **Draft**

Changing homepage banner

2. Search **banner** in title box

3. Click **edit**

4. Change the **Displayed title** to what you would like to display in the banner.

5. Add the **URL** of the page/file to be linked to in the **URL** box.

6. Click **Save**

Adding ‘Service Charter’ publication information to the website

1. Follow the instructions on **Adding a multi-page publication** to the website on P84.

2. To add further pages to the publication you will need to create another page – each page is a chapter of the publication. E.g. if you have 5 chapters you will have to create 5 pages. Use the same process as shown in **Adding a page** section on P54.

Using orange quote marks

- Start with big orange quote. End with standard single quote mark ….’.
- We aren’t using the big orange quote marks on the FOI pages so please could you delete them and just use ordinary single quotes: ‘….’
- In reports, we don’t use them for full quotes, but only for pull quotes – to highlight a powerful sentence.

Adding case summary - 2019-2020

1. Add a new **page**. Use the same process as shown in **Adding a page** section on P54.

2. Add a Title and click hide from menu

3. Add the case summary content in the **primary content** section.

4. Provide a menu link

- All Case Summaries are under the **how we have helped others** navigation menu.

Main navigation (menu):
Making a complaint > What we can and can't help with > How we have helped others

5. Add Sidebar Cards

- Add two generic sidebar cards
  Cards: (See below image for the colour and image options)
  How we have helped others card
  Complaint tool card

Alternatively you can change the generic sidebar cards to another pre-made cards which relates to case summary.

6. Change to **Publish** or **Draft**
7. Click **Save**

Sending links to embargoed documents to stakeholders

Changing Resolve card

- Go to Configuration/System/Configuration for PHSO/PHSO Newsletter.

- Replace Link two and Link two URL with Link one and Link one URL i.e. delete oldest link and replace it with second oldest.

- Under Link one, add latest issue date and a bit of explanatory text in this format:

  Resolve - October 2016: Driven to despair by DVLA

  Then add link to latest issue.

- We only use latest two links.

- Save configuration.

Site map

- This is generated automatically from the structure. Review it from time to time to make sure that it is helpful and that things are in the right place.

- You can change it by going to Structure/Menus/Main navigation.

- A few things to bear in mind:

  - It automatically puts the monthly performance stats in month order regardless of year. We could rearrange these but I think it’s easy enough to find what you want, so probably not worth the effort.

  - However, it seems helpful to put the quarterly acute trust stats in chronological order, latest first.

  - Also make sure that publications (‘reports’) are in alphabetical order by title. Don’t file things by ‘A’ or ‘An’ but by the first useful word eg. ‘A review’ goes under ‘R’.

CMS admin roles explained

Admin roles

- **Administrator:** S8080

- **CMS Admin:** Digital Comms team

- **CMS Publisher:** Comms team and other key individuals – allows them to add content and save as unpublished or to publish content. Also allows people to edit and delete content.

- **CMS Creator:** anyone. Can't edit or delete, just add content with the option to save (as draft and unpublished)

- **Unpublished content viewer:** stakeholders. S8080 will set them up with a single login that we can mail out so that people can see unpublished web pages ahead of launch.

Workflow

Image sizes for website

Main photos: High res 3000px x 2000px (6x4 ratio)
Lower res 1170px x 780px

Banner images for pages and blog: 1170px x 375px

Accordion images: 800px wide – depth can be as long as you require

Key website contacts

PHSO Digital team

Firmstep:

S8080: