



Wirral Health Informatics Service User Manual for Content Management System

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Introduction

Considerable effort and money goes into developing and setting up a website; unfortunately all too often little thought has been given to its maintenance. A common criticism of websites is that the information on them is frequently out of date. The content management system (CMS) has been developed to enable PC users with no specialist web design training to maintain a website at a basic level.

Access to this content management system means that an authorised user can make changes to the content of the website – e.g. alter or correct text, delete old and add new material.

In this system there are three levels of user to ensure that any material placed on the website has been checked and authorised:

- Editor
- Moderator
- Superuser

User Levels

Your Role as an Editor

- You can receive messages
- You can make changes to specified areas of the websites and submit these for approval to the Moderator
- You cannot view details of other users

There will usually be several editors to a website. In the My Messages section, editors can:

- access content
- read whether content edits previously submitted to the moderator have been accepted or rejected.
- Click on 'website admin' or one of the website headings to access the content for which you are editor.
- Submit all your edits to your Moderator
- Click on 'users' to edit your registration

Your Role as a Moderator

- Can send messages to and receive messages from several editors
- Has overview of status of designated areas of the website
- Can approve or reject edits
- Can view but not edit details of other users

There may be more than one moderator. In the My Messages section, moderators can:

- access content
- approve or reject the editors' content changes
- view the status of time sensitive documents
- Click on one of the website headings or 'website admin' to access the relevant editor
- Click on 'Content to be Approved' to view edits and approve or reject

- Click on 'users' to view user registrations

Your Role as a Superuser

- Has overview of all messages and status of entire website
- Has access to all areas
- Has access to all users' details
- Uploads approved edits

There will usually be only one superuser. In the My Messages section, superusers can:

- access all content
- suspend, extend or review all time sensitive documents
- Click on one of the website headings or 'website admin' to access the top level of administration which enables you to:
 - add menus, pages, documents, links, preview the changes and delete
- Click on 'user admin' to view, change or suspend any user's registration or to authorise or reject a new user.

The below graph explains the work flow of user level access:

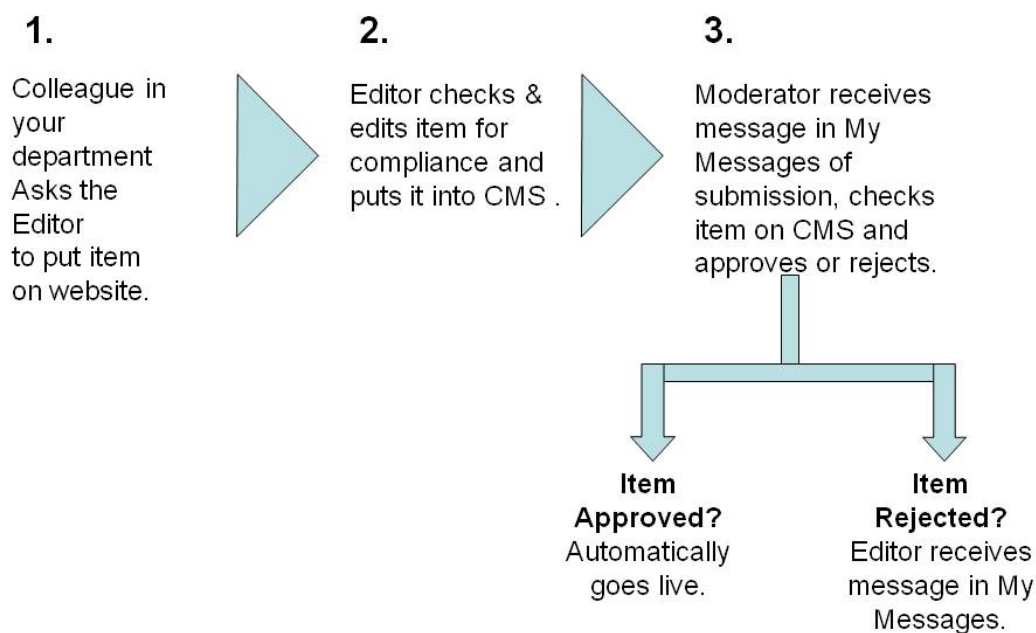


Figure 1: Editor / Moderator Flowchart

Getting Started

Minimum System Requirements

To use the CMS successfully, your computer should meet or exceed the following specification:

- Microsoft Windows XP, Vista, 7 or later.
- Internet Explorer 6 or later
- Internet connection with bandwidth of at least 256Kbps (quarter megabit), but at least 1Mbps for best performance
- Screen resolution 960 pixels wide or greater
- Javascript enabled

How to access the CMS

Open Internet Explorer and type in www.yourwebsiteaddress.nhs.uk/admin at the address bar, where yourwebsiteaddress is the url of the website you wish to edit. This will bring up the CMS login page.

Registering, Log in and Log out



The screenshot shows the login interface of the Content Management System. At the top, there is a header with the NHS logo and the text "content management system you are not logged on". Below the header is a navigation bar with icons and labels for "your messages", "website admin", "archive", "users", "website config", "log out", and "help". The main content area is titled "Content Management System Login" and contains a "LOGIN" checkbox, two input fields for "Email Address" and "Password", a "Save & Submit >>" button, and a link for "Forgotten your password? Click here".

Figure 2: Login Screen

Register if this is the first time you have used the system or 'Login' if you are already registered.

Register

Complete the boxes by typing in your valid work email address and a password consisting of a combination of letters and numbers that is at least 6 characters long, e.g. ab1234. You will not be able to log on until your registration has been approved by the superuser. Authorisation will be sent to you at the email address you have provided.

All new users will receive an email with their password, and email will also be sent to all superusers notifying them a new user has registered.

Login

If you have already registered enter your email address and your password. The system will recognise whether you are editor, moderator or superuser and give you appropriate access rights. Once you login you will be at Your Messages page of the CMS.

Forgetting your password

If you have forgotten your password click the link 'Forgotten your password'. Fill in your email address on the form. This will email you back a new password. Next time you login it is recommended you reset the password to something memorable.

For security reasons all passwords are stored as one way encoded hashes. Therefore it is not possible to find out what your original password was.

Logout

You can use this button or you can just exit from the system; you will automatically be logged out after 20 minutes if the system is not in use.

Your Messages

Page Name	Username	Review Date	Extend / End
Hospitals	admin@Admin.com	14/09/2006 00:00:00	✓ ✕ ✕ review preview
A to Z of services	admin@Admin.com	14/09/2006 00:00:00	✓ ✕ ✕ review preview

Figure 3: My Messages

Superusers and Moderators

Approving Content

Superusers or moderators have to approve the work of their editors before it goes live on the website. The moderator will then log on to the website and in 'your messages' there will be a note that there is content to approve. The superuser or moderator can either approve or reject the content. If the content is rejected then a reason must be given.

Editors

Content Rejected

If content is rejected by your moderator, the content will appear in 'your messages' with the reason why it is rejected. You will have the choice to edit it, and then re-submit it for approval by your moderator.

Expired Content

28 days before content is due to expire, this information will appear in 'your messages'. Click the review option in Figure 3 above and review the content and fill out the archive and renewal dates with new dates.

Clicking the tick to extend will add 28 days to the renewal and archive dates.

Users (Superusers)

Approving Users

When a user signs up to use the CMS to make changes to the website, it is up to the superuser to approve them and decide which area of the website they can have access to.

To approve a user you go to the users section. You then choose whether they would be a superuser, moderator or editor. If you do not want to authorise them then you would choose 'none' from user level drop down. To give them access to sections of the website then please look at [website config](#)

Changing a user's userlevel

You can change a user's userlevel by editing the user and changing the dropdown box User Level. There are four options, superuser, moderator, editor and none.

Editing a user's profiles

You can change a user's profile by editing the user but it is not possible to change their email address, if this needs to be done please contact WHIS.

Removing a user's profile

It is not possible to remove a user's profile. If you no longer want them to access the CMS then set the user level to 'none'.

Resetting Passwords

You can reset a user's password by editing the user.

Users (Moderators and Editors)

Editing your profile

Here users can change their password or name but not their email address.

Adding information to the website

Before you start setting up your website please refer to the [Guidelines for writing Content for the web sites and intranets](#) to help you make the most of your website.

Editors can edit/access pages created by themselves or other editors/moderators within their user group. When an editor creates a new page or edits an existing one, the page needs to be marked as inactive. When all the changes have been made the page can then be ticked as active and this will sent it to a superuser or moderator for approval. The editor cannot make any changes until it has either been approved by the superuser or moderator, or sent back for changes.

Moderators can create and edit pages created by themselves or other editors/moderators within their group without the need to approve it.

If an editor creates a new menu, all editors/moderators within the group will have access to create/edit content within the new menu.

Moderators can access/edit any page/menu they wish within the sections they have access to.

Ordering of Items on Menu

All items on the menu can be re-ordered. However problems can occur as every item added to the menu initially has their priority set to 0. So sometimes by clicking the up and down arrows it doesn't display as you wish. On the newer versions of the CMS system you have the option to re-order the menu by inserting a number in the box and pressing the disc re-order icon.

Differences between menus and pages

In simple terms, you use a menu when there is more than one page within it. If there is only going to be one page of information, it is better just to use a page.

When submitting names for menu headings or menu sub-sections make them as concise and clear as possible. Menu titles should ideally be kept to a maximum length of 3 words. This ensures clarity and uniformity for the end user

Adding Menus



Figure 4: Adding a menu

To add a menu select 'add menu' as highlighted above in figure 4, you will then see the below screen where you need to fill out the following:

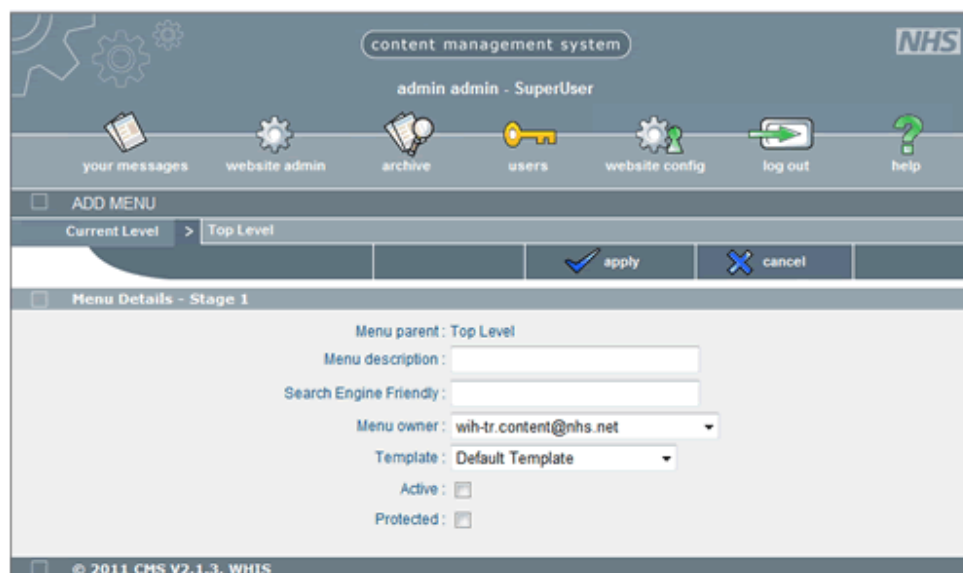


Figure 5: Adding a Menu 2

Menu description - This is what will appear on the menu, for example in figure 5 a menu description would be 'About Us'

Search engine friendly - Depending on your website configuration this may be filled in automatically by the CMS. This is the quick link to the section. For example for 'About Us' you could use about/. It must end in a '/' and all in **lowercase letters**. If you want to add a space between the words use a hyphen e.g. about-us/

Menu owner - In most cases it will automatically come up with your e-mail address, if not click on the down arrow and select your e-mail address

Template – If there are different templates in your website for example: Communications section choose Communications

To make the section live you must tick the **active box**. You would only ever tick the protected box if the section of the website is password protected so this can be left blank if it is not set up with this feature.

Once all the form fields are complete click apply. The CMS will now prompt you to add a homepage, which is the same as adding a page.

Adding Pages

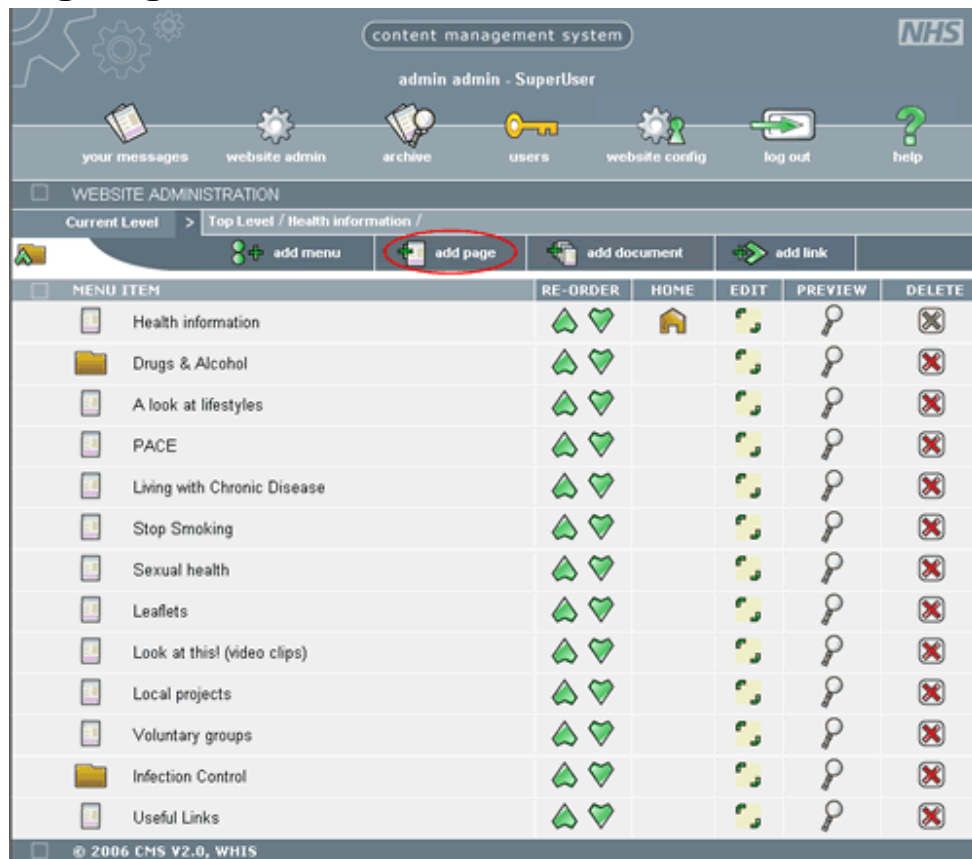


Figure 6: Adding a Page

Click add page highlighted in red in figure 6

- Type in a title for the page as highlighted in figure 7 below
- Type in the 'live', 'renewal' and 'archive' dates. (Choose from the calendar) or alternatively in-put them in yourself using the keyboard

Live date – this is the date that you would like the page to become active

Renewal date – this is the date that you would like reminding that the content needs

renewing

Archive date – this is the date you want the content to drop off the website

- Page Active – Click this button to make the page live, if you are working on the page and don't want it to go live then leave it blank till you are ready.
- Type any text you require on the page into the text editor box, formatting as you would in Word. (refer to [Copying and Pasting from Word](#) instructions below)
- Save or apply the changes

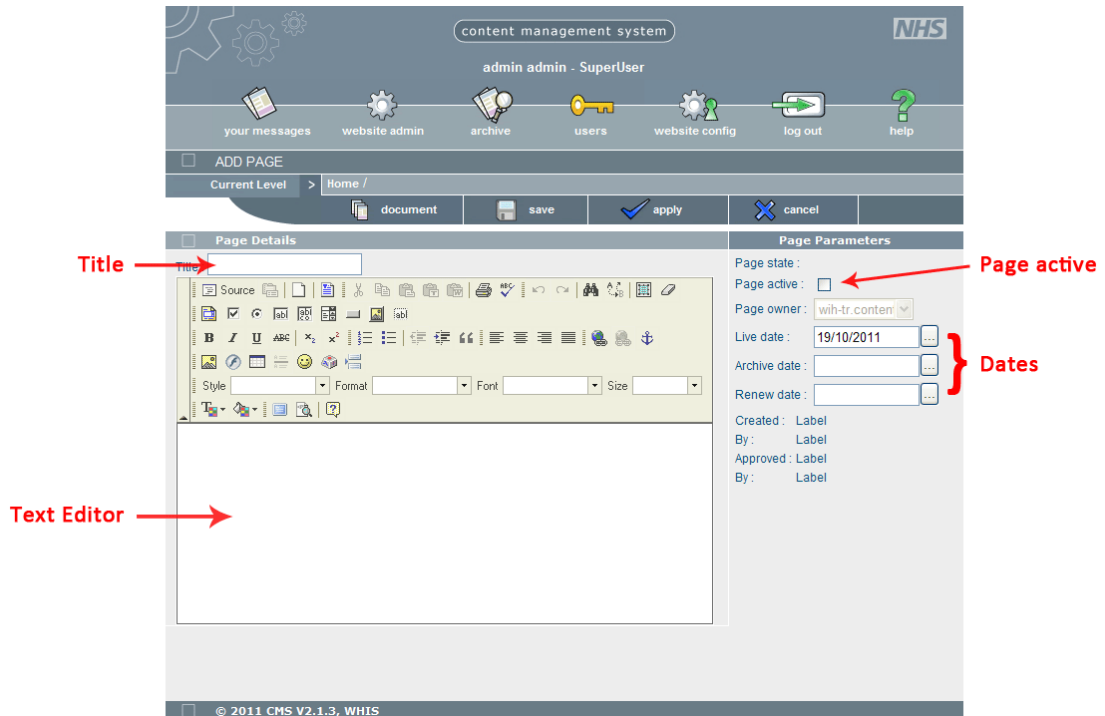


Figure 7: Adding a page screen

Text Editor

The User Guide for the text editor can be found at http://docs.fckeditor.net/FCKeditor_2.x/Users_Guide. Some common features for the text editor are explained below.

Copying and Pasting from Word

When copying and pasting from Microsoft Word please use the button circled in red in figure 8 below, rather than any other button. This button will remove word formatting, and strip out poor coding.

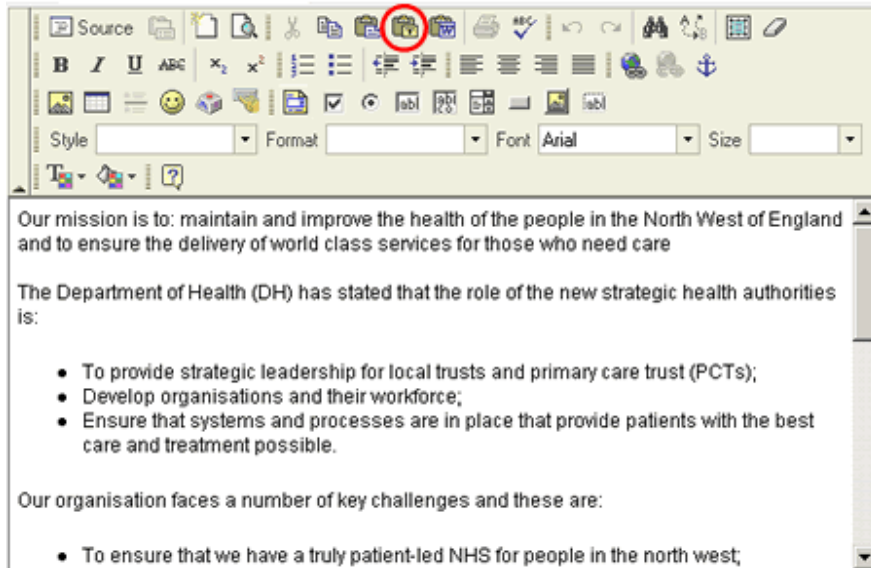


Figure 8: Copying and Pasting from Word

Changing Fonts

The website is set up so that the size and font of the text is automatically formatted for you. By changing the text size, this no longer makes your website accessible as it is not possible for users to change the text size.

Formatting the Text

To create a new paragraph press the ENTER key, the editor will create a new paragraph. To make the text appear on the line immediately below press the SHIFT+ENTER keys simultaneously.

Bullet Points

To add bullet points to the text it is very similar to word. You may find that by adding bullet points it indents all the text below. To undo this simply where you no longer want the bullet points to appear press the enter key to add a new paragraph and then press delete to delete the bullet point automatically put in.

Adding Images

To add an image within the text editor, click the image button highlighted in red in figure 9. Please read the information about [Guidance on Images](#)

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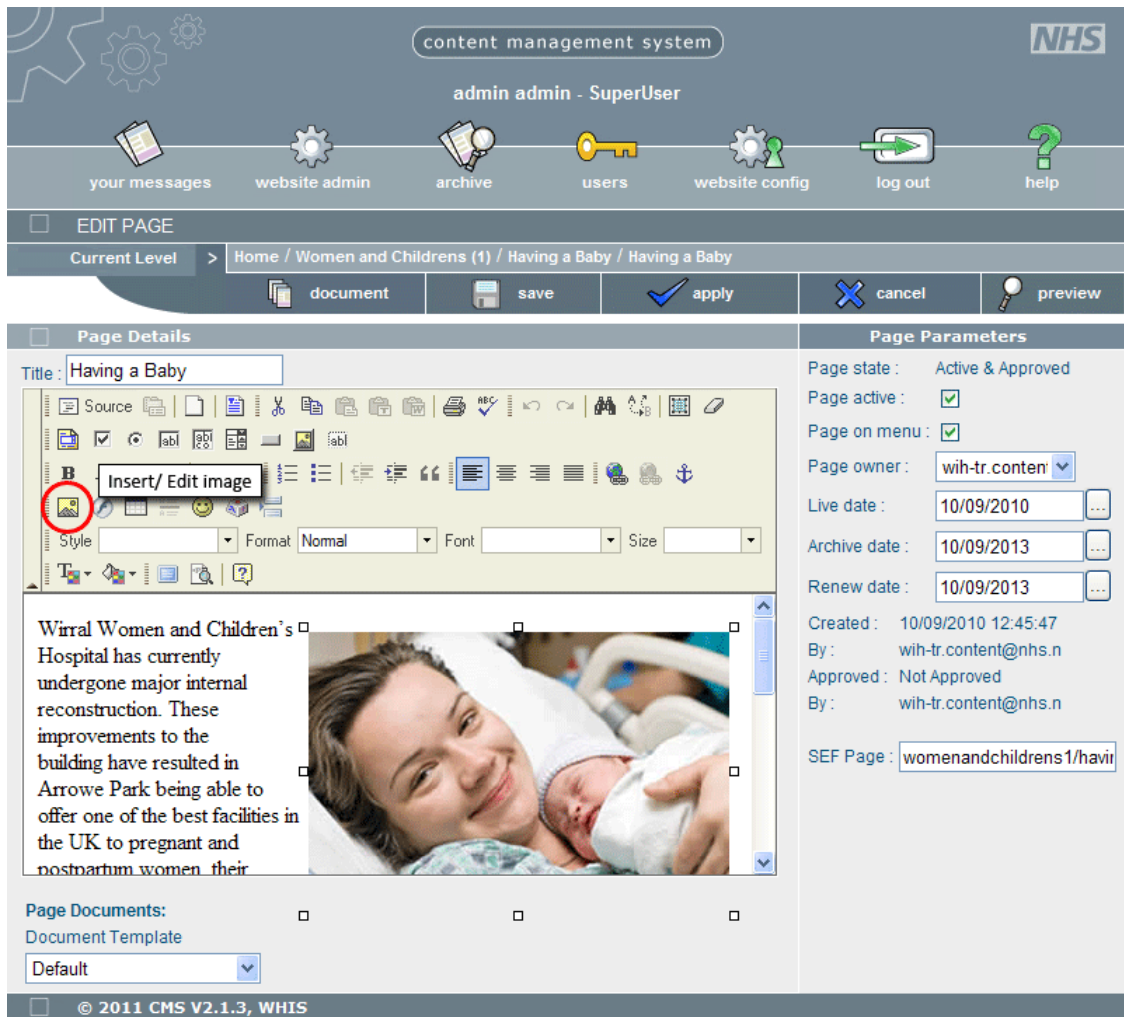


Figure 9: Adding an image

This will open a pop up window. Click the Browse Server button. This will display all the images you have uploaded. If you would like to upload a new image, at the bottom click the browse button, this will open the file system on your computer. Select the image you would like to upload and then press the upload button. Having uploaded the image you then select it from the list which will take you back to the image properties box figure 10 below. Here you need to make sure you fill in the 'Alternative Text' it is important to ensure the website meets accessibility guidelines and the text explains what the image is about. You can also choose how you want the images aligned, either in the centre, left or right side of the page.

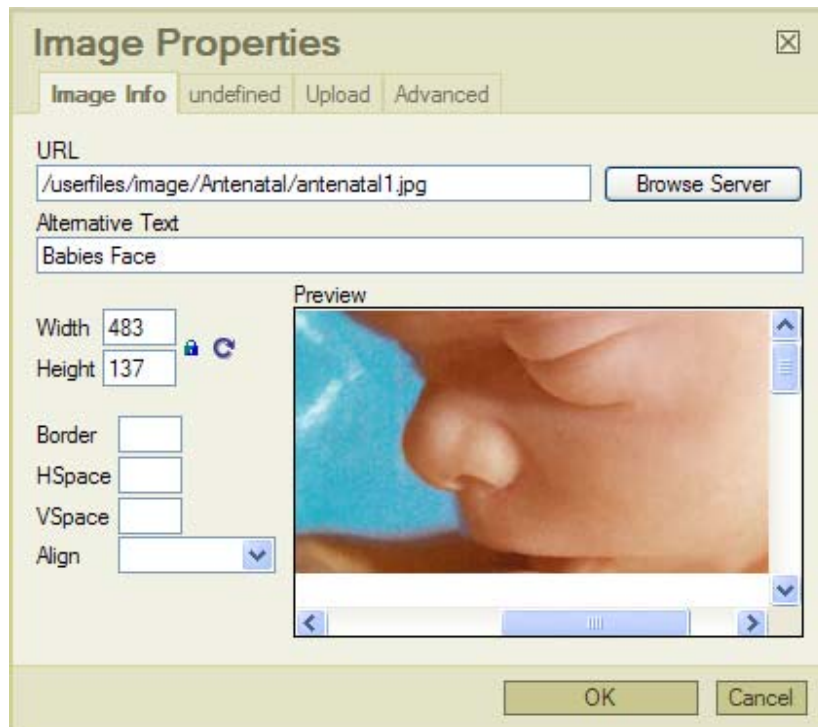


Figure 10: Adding an image

Creating links in text editor

To add a link, highlight the phrase to be hyperlinked, click on the link icon highlighted in green in figure 9 above.

- If you want to add a url choose the link type url, type in the web address in the url box.
- If you want to add an email address, choose link type email. In the email address box enter the email address, then click ok

Adding Tables

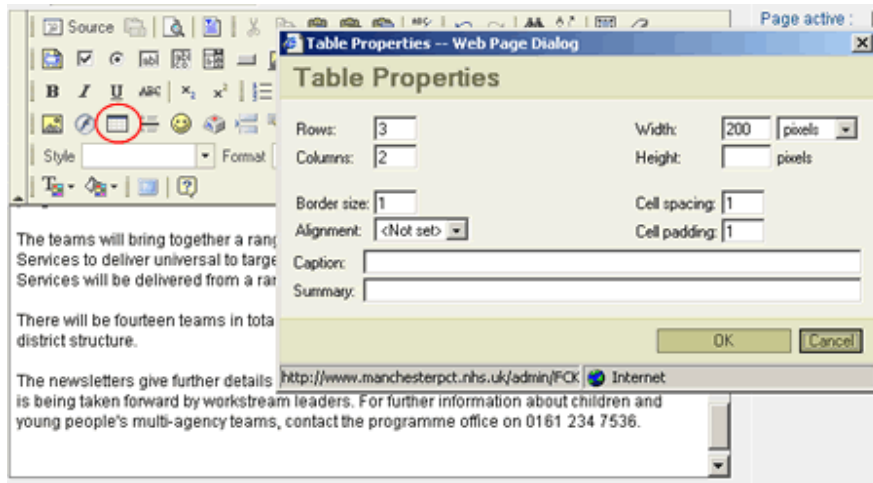


Figure 11: Adding a table

To add a table within the text editor, click on the table button highlighted in red in figure 11 above. This will bring up the window shown in figure 11. Choose the number of rows, and the number of columns. Set the width, if it is to go across the screen then set the width to 100%. If you do not want a border set the border size to 0, setting the border size to 1 will add a border to the table. Choose the alignment of the table, this can be centre, left or right on the screen. Tables generally should be used for data. Therefore give the table a caption, e.g. number of patients, and a summary e.g. This table contains figures of the number of patients in each PCT across the country. When you have filled in the form press OK, this will have now added a table to the text.

You will now be able to add information into each cell within the table by simply clicking within the square.

Creating Anchors

Anchors allow your users to 'jump' from one section of your web page to another section on that same page. A common use for anchors is when your page displays a large amount of text. If you have a lot of information on a page it can make the page hard to navigate and to read so we would use anchors to easily jump between each question and answer. Firstly click your cursor in front of the first paragraph of text and click on the anchor icon circled red in figure 12 below. In the anchor properties window which has popped up you need to give the anchor a name for example paragraph1 (admitting any spaces), then click OK. Once this has been done highlight the first question at the top on the page and click the button insert/edit link highlighted blue in figure 12 below. Change the link to "Anchor in this page" and select the anchor you have inserted 'paragraph1'.

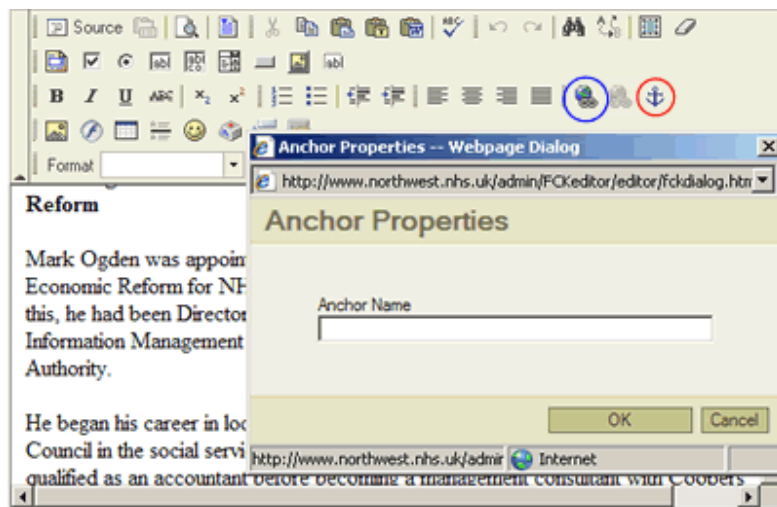


Figure 12: Adding an anchor within text editor

Adding Documents

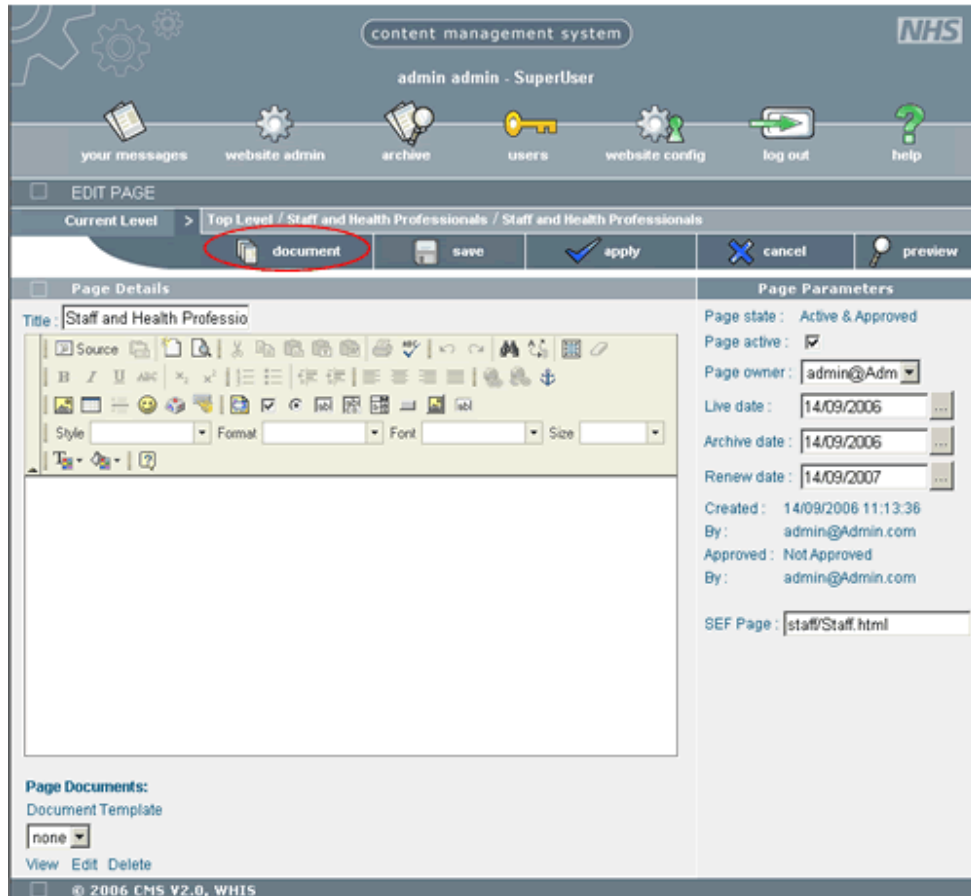


Figure 13: Adding a document

To start with you have to add the document to the Document Library, click 'document' highlighted red in figure 13 above.

If a category does not appear click "Create Category". You will then be asked to give that category a name, when filling in the category name ensure you use lowercase text and admit any spaces e.g about-us or clinical-skills

Once you have created the category the folder will appear in your document library, click on the folder icon and select 'upload' highlighted green in figure 15 to start uploading your document.

The below screen will then appear:

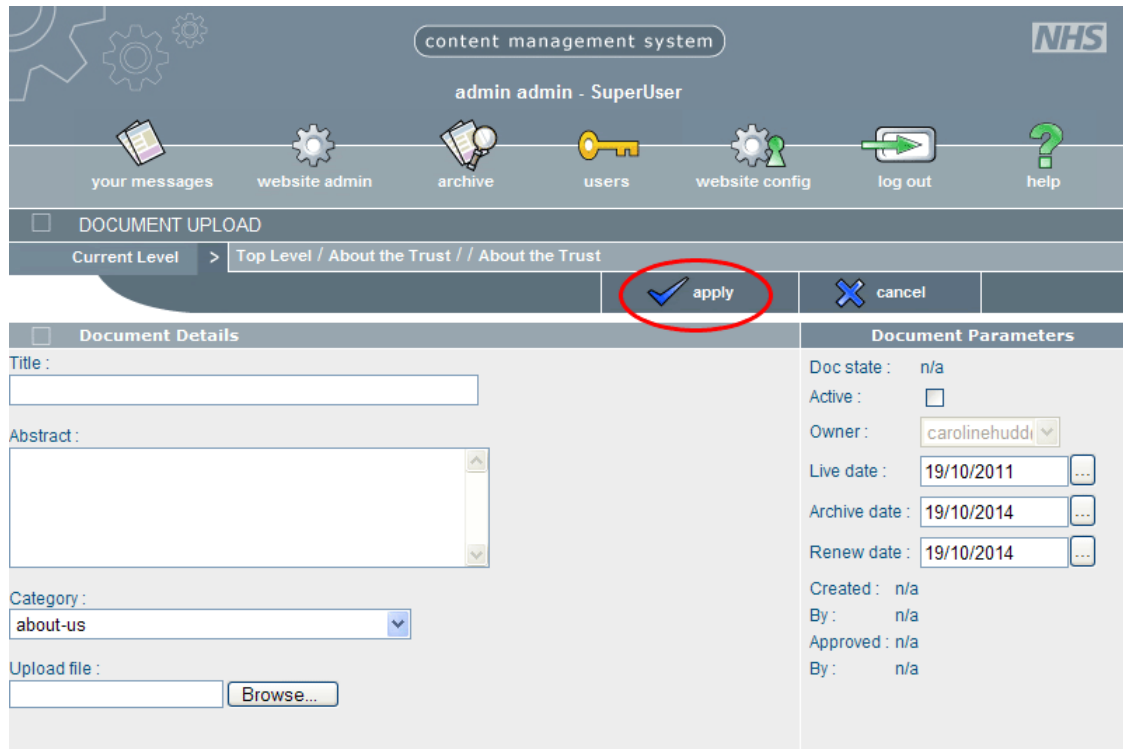


Figure 14: Adding a document

- Complete the details in new screen re title, abstract etc.

Title is the title of the document

Abstract is to provide more information about the document e.g. who asked for the update – This information will not appear on the website only in the document library.

Category this is where your document will be stored in the document library

Upload file browse for the document you want to upload. When uploading a file please consider the file size. To decrease the file size and prevent users from changing the document it is possible to convert them to a pdf (Portable Document Format). You will need to install some software to do this, please contact your IT helpdesk for further information. **Please note** if you are adding lots of documents with the same filename, please rename them as the original file would be overwritten when you upload the new document with the same filename.

- **Tick** the box to make the document active, if your document doesn't appear in the library you have forgotten to tick this box

Live date
Archive date
Renew date

} will automatically be filled in, you can overwrite this information

Once all the above information is completed click **'apply'** as **figure 14** and you will be taken to the below screen see figure 15.

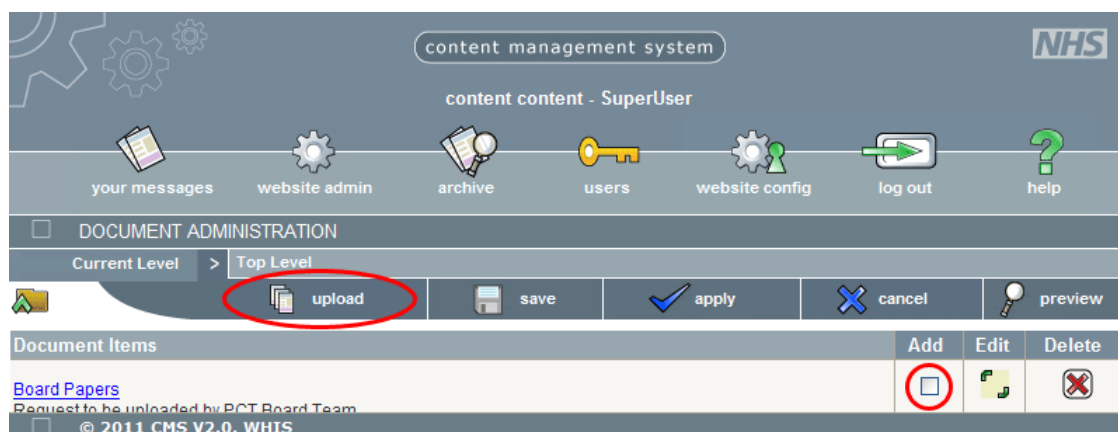


Figure 15: Document Library

Adding Documents onto a page

Once you have added a document to the Library, you can add it to the relevant page of the website. First you will need to edit the page and then click the document link highlighted red in figure 13 above. If you have uploaded the document it will appear in the library, if it doesn't follow the instructions on adding a [document to the library](#).

Select the document you want on the page by ticking the box add, as shown highlighted red in figure 15 and either saving or applying the change,. It will now be listed on the page. By default all documents added to the page in this way will appear at the bottom of the page, underneath the content, where you have the option to re-order if you have more than one document.

Adding Documents within the text

It's always advisable when you are writing about something e.g this month's board papers you create a link to the document you are referring to. To do this you still need to upload the document to the document library. In figure 15 above you can see 'Board Papers' has been uploaded and is highlighted blue click on this link to get the URL, copy the link and go back to your page by using the breadcrumbs (current level). Once you are on the page highlight the text that you want to add a link to e.g April 2011 [Board Papers](#) are now available. Add a link and copy your copied link into the url box. Please refer to [creating a link](#) for further information.

Adding Links

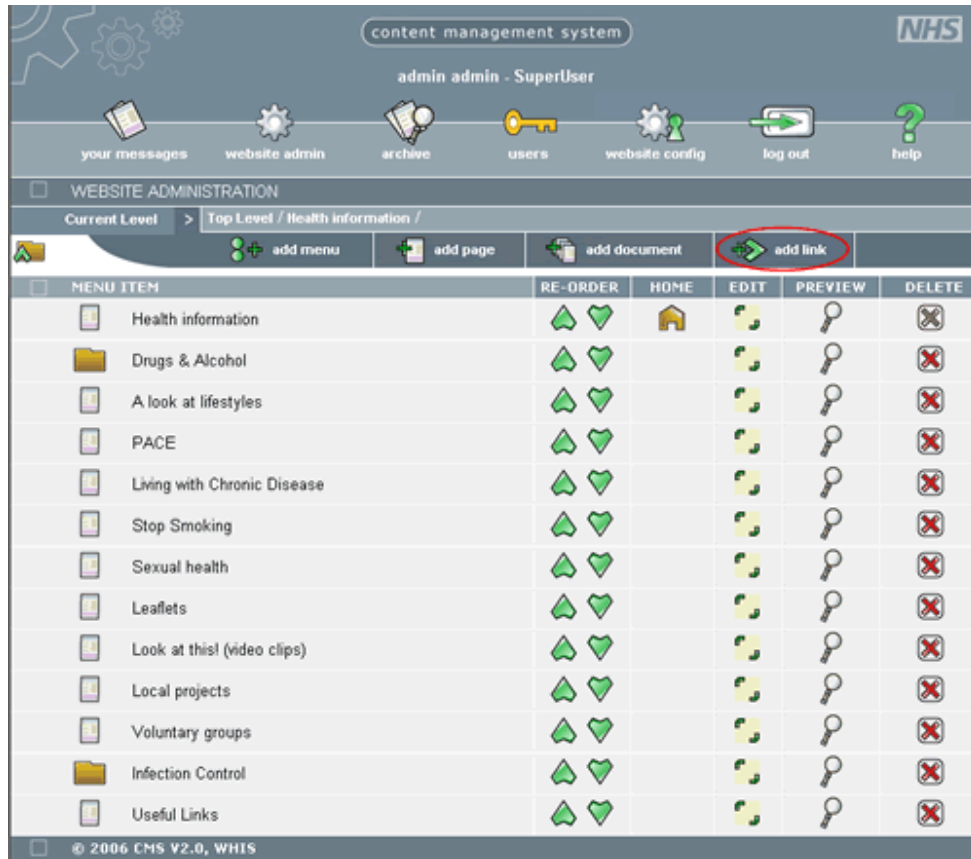


Figure 16: Adding a link

Click the add link button highlighted red in figure 16 when you want to add a link to the link library.

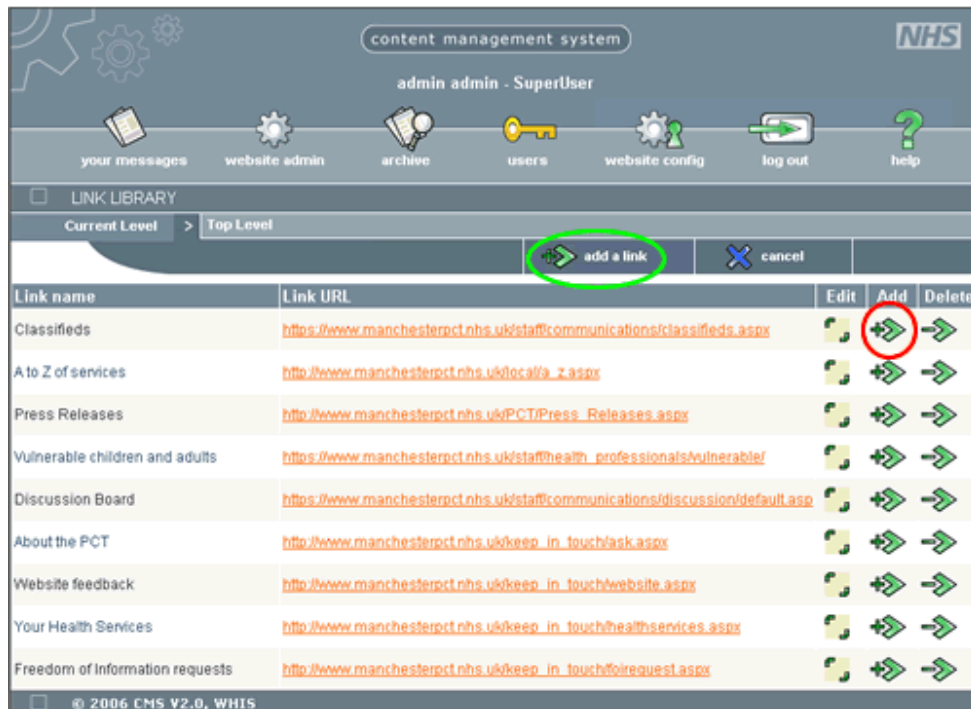


Figure 17: Link Library

Click 'add a link' highlighted in green in figure 17.

A screen will appear for you to enter the URL and Description e.g.

URL: <http://www.nhs.uk>

Description: NHS Choices

Press apply, this will now have added the link into the link library. To add the link to the page click the link "Add" highlighted red in figure 17.

Editing the website

Editing the website is very similar to adding information. The pages that you use to add information are the same as those you want to edit.

Editing menus

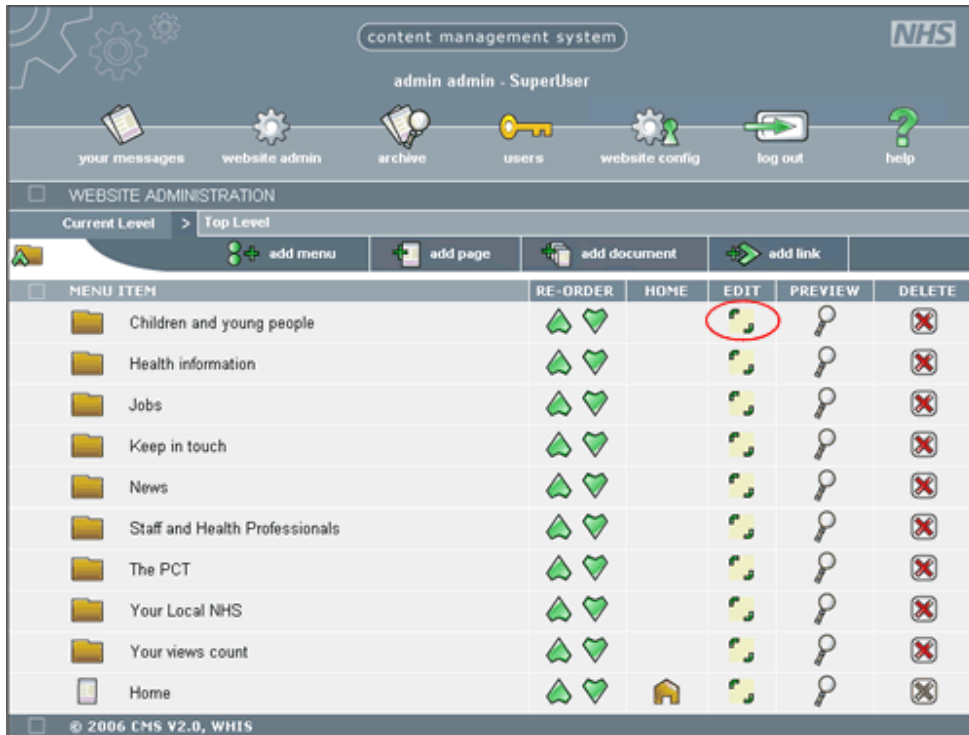


Figure 18: Editing the menu

To edit the menu properties click the edit button highlighted red in figure 18.

Editing Pages



Figure 19: Edit page

To edit the page, click the edit button highlighted red in figure 19.

Editing Links

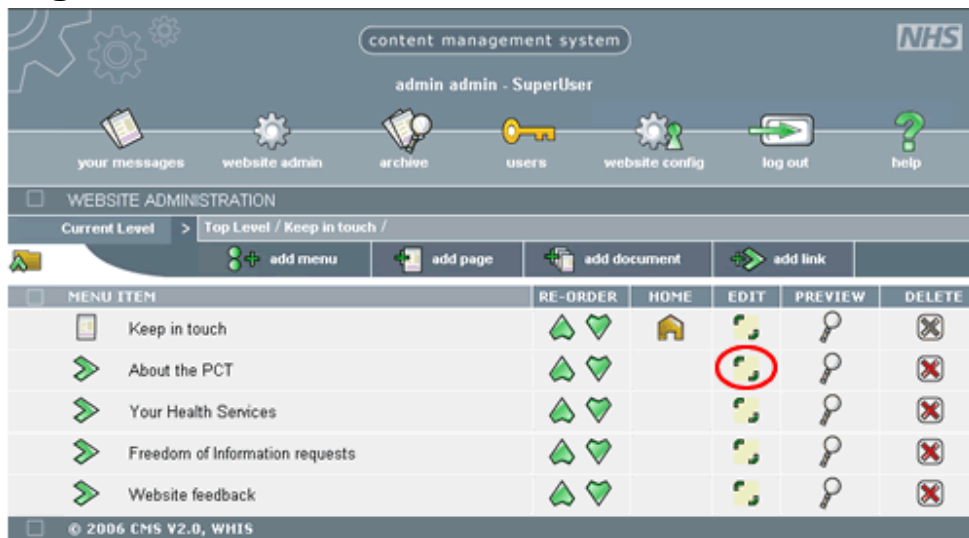


Figure 20: Edit Link

To edit a link, click the edit button highlighted red in figure 20.

Editing Documents

To edit a document from a page you need to click in the page and scroll to the bottom where you can edit the document see figure 21 below. Once you click edit it will take you back to the document library where you can overwrite the document and change the dates.

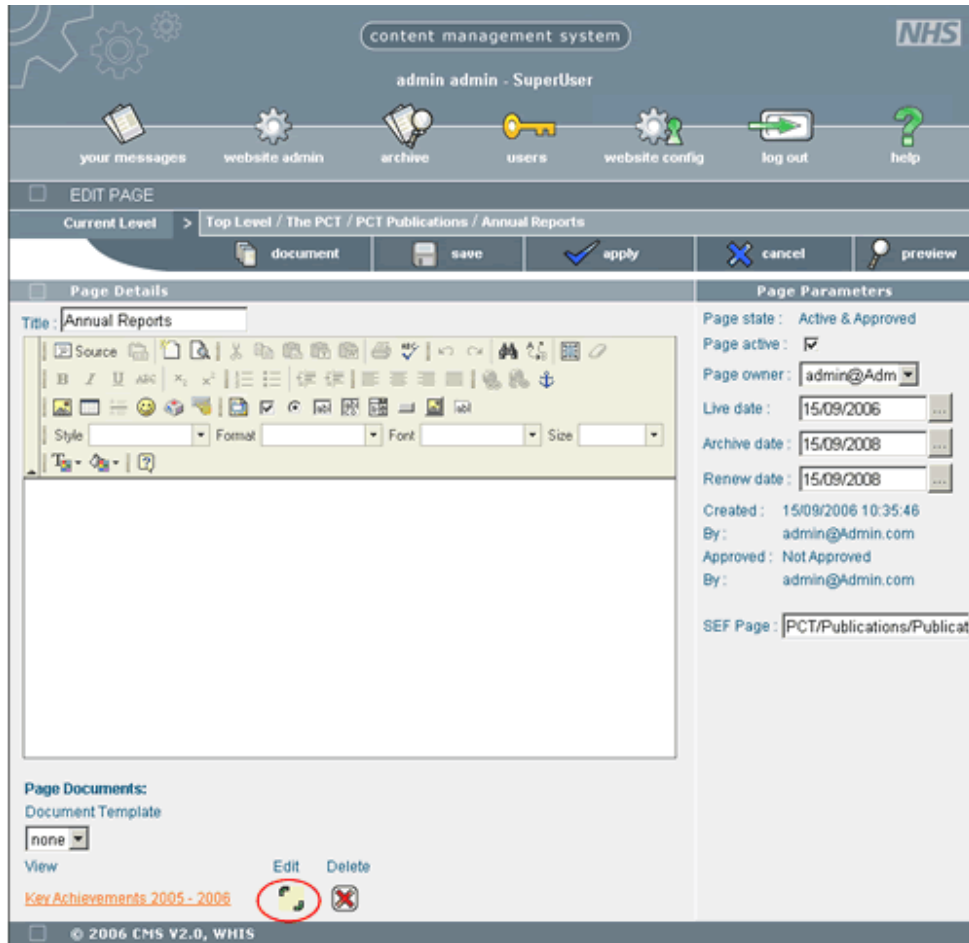


Figure 21: Edit a document

Deleting

It is not possible to delete the homepage. The delete button will be greyed out. Whenever you delete anything, it is never actually deleted but instead it is stored in the archive.

To delete a homepage, you must go up one level to the previous section and delete the entire section. Meaning any pages within the same section as the homepage you want to delete will also be deleted.

Deleting text from within the editor cannot be retrieved and will be lost forever. If you wish to keep some text it is best to copy and paste it into a word document.

Website Archive

If something has disappeared from the website, click on Archive, you will go to a User Admin Screen that looks similar to the website but you can only restore from here, you cannot edit or delete. Look for the lost material in the relevant section; use the restore button to replace it on the website.

Website Config

Depending on the set-up of your website, depends on the number of options you have available in the website config section. For completeness all are included, but they may not be implemented on your website.

The screenshot displays the 'Website Configuration' section of the CMS. At the top, there is a navigation bar with icons for 'your messages', 'website admin', 'archive', 'users', 'website config', 'log out', and 'help'. Below this, the 'WEBSITE CONFIGURATION' section is expanded, showing several tables for different site management areas. Each table has columns for 'Name of Site', 'URL', and 'View'. The data shown in all tables is for the 'Manchester' site with the URL 'http://www.manchesterpct.nhs.uk'.

Site Administration		
Name of Site	URL	View
Manchester	http://www.manchesterpct.nhs.uk	

CMS Users/Group Management		
Name of Site	URL	View
Manchester	http://www.manchesterpct.nhs.uk	

Website Users Management		
Name of Site	URL	View
Manchester	http://www.manchesterpct.nhs.uk	

Statistics		
Name of Site	URL	View
Manchester	http://www.manchesterpct.nhs.uk	

A - Z Services		
Name of Site	URL	View
Manchester	http://www.manchesterpct.nhs.uk	

PCT Staff Classifieds		
Name of Site	URL	View
Manchester	http://www.manchesterpct.nhs.uk	

PCT Services		
Name of Site	URL	View
Manchester	http://www.manchesterpct.nhs.uk	

© 2006 CMS V2.0, WHIS

Figure 22: Website Config

Site Administration

The site administration area is the more technical area.

Options include

Caching – enabling, clearing and resetting the cache

Registrations – gives the option of suspending registrations for the CMS and website.

Search Engine friendly – enabling the SEF menus and changing the extension.

WARNING it is not advised to change these options without talking to WHIS first as this could cause the website to stop working.

CMS Users/ Group Management

Establishing the moderator /editor relationship



Figure 23: Creating Groups

To assign a moderator first you need to create groups. Create a group for the section by clicking the new group link as highlighted in red in figure 20, e.g. For the Children and Young People section create the group childrenyp

Once you have created the group, you then need to add users into the group, you do this by clicking the select link highlighted in blue in figure 20. You will then be given an option to add users to the group. Please note that you must also have already assigned each user a particular role, e.g. moderator or editor. More information can be found in the section [changing a user's userlevel](#).

Assigning Users to areas of the website

Now that the groups have fully populated you then need to click the link select next to the section you want to assign, e.g. Children and young people highlighted in green in figure 20. You will then have the option to assign a group to the menu.

Websites Users Management

This section is so that you can approve users so that they can **view** the website. To allow them to view the website click the active button.

Manchester PCT Website Only

By default if a user with an email address ending in '@manchester.nhs.uk' registers with the website then they will be sent an email to confirm that it is the correct email address. If they click on the link within that email they then will automatically get access. If a user with an email address ending in other than '@manchester.nhs.uk' registers then the superuser will need to approve them.

Staff Classifieds

This is where you can approve and disable classified ads that have been put onto the website.

A-Z of services

The A to Z of services can be edited here.

PCT Services

This is the area of the CMS where you can edit and add doctors', dentists', opticians' and pharmacists' details.

News

Here you can add, edit and delete news stories. There can be a number of different types of news that can be added to the website depending on your website configuration, e.g.

News (press releases) – Official press releases

News (local) – Localised stories

Smart Practice – smart practice stories

Health Stories in the NW – press releases from around the North West.

News – Women and Children's section – wuth women and children's stories only

News – Kaizen section – wuth kaizen news stories only

News – GP section – GP news stories

All stories are added in a similar manner, by adding headlines, extracts and the main story. For Health Stories in the NW only the story needs to be added.

Newsletter comment admin

To enable users to comment on newsletters first you must add the newsletter title to the newsletter admin section of the CMS. To do this login to the CMS and navigate to the config section of the website using the menu button at the top of the page as highlighted in red in Figure 21. Once in the web config section click the newsletter admin button as highlighted in green in Figure 21.

User Manual for Content Management System

Figure 24: Navigating to newsletter comment admin

Adding a newsletter

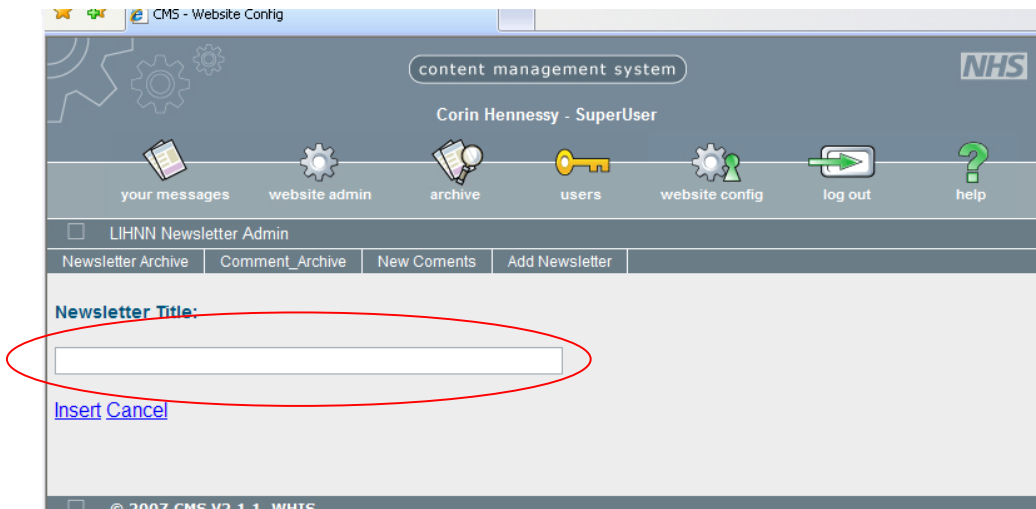


Figure 25: Adding a Newsletter

Once in the newsletter admin section you must first add the name off the latest newsletter as this will enable users to comment on it. Using the Add Newsletter button navigate to the Add Newsletter section type the name of the newsletter in the textbox as highlighted in red in Figure 24 and then click this insert button.

Approving comments.



Figure 26: Approving Comments

Once you have added a newsletter, users are able to comment on this newsletter. When a user adds a comment, this comment will not be visible to the public until it has been approved by a member of the admin team. To check for new comments that need approving navigate to the new comment archive using the menu at the top of the page. Once here if there are any new comments they will be displayed in a table like the comments are shown in figure 25. You have three options for each comment you can preview, approve and delete these comments. If they are approved they will then be shown on the public website and other users will be able to see them.

Comment Archive

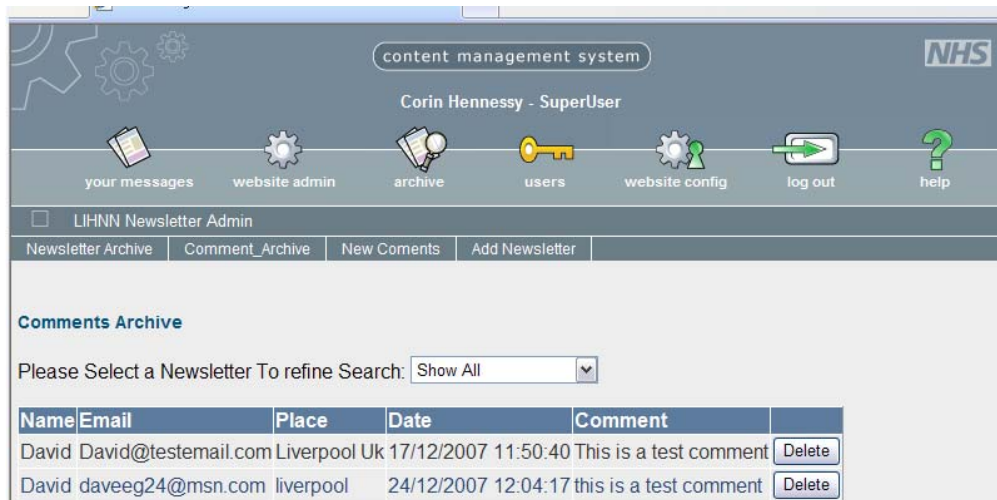


Figure 27: Comment Archive

The comment archive section displays all old comments that have been approved; you can delete old comments from this section.

Newsletter Archive



Figure 28: Newsletter Archive

The newsletter archive section allows you to view and delete old newsletters from the comment facility. This is useful to see the last newsletter that was archived.

Front page Gadgets

This is the area that allows you to edit the gadgets, or movable boxes on the homepage. Select the name of the gadget you wish to edit, click the edit button, make the changes and click update. To add a new gadget you will need to contact WHIS.

PCT Pages

This is the area that allows you to edit the PCT pages of the website. Select the name of the PCT you wish to edit, click the edit button. This will then present to you the options of the PCT page. Make the changes and click update.

PCT Statistics

Here you edit the statistics for the PCT area of the site. These appear on each PCT page, and are randomly chosen from the statistics input into the database for that PCT. Select the PCT you wish to edit and either you can add a new statistic or edit an existing one. If you wish you can choose to delete a statistic from the database.

PCT Gallery

The PCT Gallery is viewable on each PCT page. Here you have the option of adding new photos to each PCT gallery. Select the PCT you wish to edit, and either delete an existing image, or upload a new one.

Help

Clicking the help button will bring you to this help guidance.

Advanced Features

Adding Forms

To add a form to the website, design the form in the text editor. WHIS will need to know what the form needs to do, and then they will design it.

Adding Scripts

If you want to add any scripts to your page this cannot be done from within the text editor in the CMS. Please contact WHIS for assistance.

Adding New Templates

Templates need to be added by the WHIS web development team.

















Password Protecting Areas



Before password protecting an error please speak to WHIS first for assistance as work will need to be done on the website before it will work correctly. To add password protection to an area within the site you need to tick the box on the menu that says protected. Users will now only be able to access this area by registering with the website and entering the password they registered with.









Figure 29: Password Protect Areas

Glossary

	This is a menu, clicking on it will show you its submenu items
	This icon allows you to go back to the previous menu set
	This icon denotes a homepage
	This icon denotes a page
	This icon denotes a document (pdf, word, excel etc)
	This icon denotes a link
	This icon allows approving content and also applying changes
	This icon allows disapproving content and also cancelling changes
	This icon allows you to re order sections, moving up
	This icon allows you to re order sections, moving down
	By clicking on this icon it allows deletes (archives) an object or an entire section
	This previews the site or current page
	This edits content, and menu properties
	This removes a link from the link library
	This icon adds a link to the link library
	This restores an object from the archive to the CMS

	This registers you with the system
	This logs you on to the system

	This adds a new section
	This adds a new page to the current section
	This adds a document, from library or new
	This adds a link to the link library, and adds to a section
	This shows you what content needs approving, due to expire
	This shows you all websites and is the main editing screen

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This shows you the website archive



This sets up users, groups, and permissions



This allows you to edit users and change the website configuration



This logs you out of the system



This is where you will access the most current CMS manual

Wirral Health Informatics Service

Guidelines for writing content for websites and intranets

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1.0 INTRODUCTION

This document has been produced by the WHIS Internet Division and distributed to all NHS organisations for which the Division produces web sites and systems. If you have any questions relating to this document, please e-mail wih-tr.content@nhs.net

2.0 WRITING WEB CONTENT – GENERAL PRINCIPLES

Writing for the web needs a different approach from writing for print. Unlike print, which is passive (i.e. the reader doesn't interact with the text), the web is **active**.

If the content does not provide the information needed by users, the web site will provide little value no matter how easy it is to use the site. The primary goal of a website is to communicate **key messages**.

Keep in mind your purpose and goals, and the target audience

What is the purpose of your website? What do you hope to achieve with it? What are your goals?

Write down your aims and objectives for the site. This will help keep you focused on working towards and achieving the goals you set out.

Take some time to think about your target audience. It's easy to just write and write, with no particular reader in mind. The problem with this sort of writing is that few people will read it. Think of the audience as busy, impatient people who are on the web to find out something. What do you plan to say to them and how will you say it?

Ask yourself:

- Is this clear, legible and understandable?
(Remember you don't know if your audience has language or learning difficulties)
- Is there a simpler way to say this?
- Is there a shorter way to say this?
- Is this necessary?

In accordance with the Data Protection Act 1998, please make sure when you are uploading information that there is no **personal information** going onto the website, this can be in the form of people's home address or personal email addresses.

3.0 PREPARING THE CONTENT

When preparing content for a web site, use familiar words and avoid the use of jargon, abbreviation and acronyms. Terminology plays a big role in the NHS and it is important that your site's users (staff, patients) understand what is meant, e.g. "Cancer Screening" could be changed to "testing for cancer".

If acronyms and abbreviations must be used, ensure that they are clearly understood by users and defined on the page.

Scannable text

People don't read web pages word for word; they scan for information and have a much shorter attention span than they would with printed text. Past experience indicates that people look at headings and subheadings first; they scan for hyperlinks and keywords. They jump around the screen scrolling and clicking - their fingers never far from the browser's "Back" button. To overcome this behaviour we need to keep information as brief as possible: "**short is better**".

Plain English

Try to use the same terms and phrases in your content as your readers use when they talk or write about the subject matter in question. This will help you write clearly and in a way that they will easily understand and have a higher chance of being picked up in searches.

The following points will help people understand your meaning:

- Don't use long or difficult words when shorter or simpler ones will do
- Explain any technical or medical terms, even if you think your audience will understand them
- Avoid words that can have more than one meaning
- Use active rather than passive voice (e.g. 'you should send your form to...', rather than 'your form should be sent to...')
- Use minimum punctuation, preferably just commas, capitals and full stops.
- Never assume the gender of your reader – use "they" or include both genders

Presentation

- Do not use large blocks of italic or all-caps text, as it is difficult to read
- All-caps text is also likened to shouting at your audience
- Avoid underlined text, as it can be easily confused with a link
- Don't centre everything on your web pages
- Do not change the colour of text from black

Avoid scrolling pages where possible

This can be done in a number of ways:

- Editing your content to make it shorter
- Breaking up large chunks of content into multiple pages
- Cutting unnecessary content
- Linking out to other supporting websites

Signpost your reader to key points

Provide obvious signposts to the key messages and chunks of content on your page to increase their usability and effectiveness:

- Pick out keywords and phrases in bold
- Use headers to tell readers what large chunks of text are about
- Use graphics as visual clues to what your content is about
- Use bullet points or lists to summarise your page's content
- Link to information rather than duplicate

Keep it concise

- Use short sentences and short paragraphs
- Keep your language and sentence structure simple
- Stick to one idea per paragraph
- Remember, short copy is good copy

Tell your user the full story

For example, don't just tell your user that they will need to fill in a form to get something done. Tell them where to find the form (provide the link), along with details of where to send the form (links to contacts).

Housekeeping

Almost all content has a sell-by date, so regularly monitor your site for out-of-date content.

Basic elements of good practice:

- All content on your site must be relevant, accurate, up to date and useful
- Publishing is a two-way process – content must be taken down as well as uploaded
- Your website is not an archive for storing out-of-date documents; it is the responsibility of you the author to keep master copies of publications.

4.0 SUBMISSION PROCESS

The WHIS Internet Division is here to help you with the process of getting content onto your web site or your section of a larger web site. Once you have put your material together, following the guidelines in this document, you are very welcome to pass the material to the Division for posting onto your site. Please e-mail it to wih-tr.content@nhs.net. You can also e-mail it to that address if you would like a second opinion on whether it is ready and suitable for publication.

5.0 FORMATS

Saving Files

When saving any document remember to keep the file name as short as possible, replacing or omitting any spaces between the words e.g. 'Boardpapers 20011.doc' becomes 'Boardpapers_20011.doc' or 'Bp11.doc'.

PDFs

It is highly recommended that all documents are converted to Portable Document Format (PDF). PDF documents are created with Adobe Acrobat software. PDFs protect the format of a document so that it will look exactly like the printed version when viewed on a computer. This is the most common format for downloadable documents. They cannot be amended and are compressed, so they are usefully smaller than the original file. They can also be opened on many different computer operating systems and the required reader software is free to obtain from Adobe's website.

Images

Images should be saved as either a **jpeg, jpg** or **gif** file wherever possible at a screen resolution of **72 dpi** (dots per inch). This ensures compatibility with web browsers but helps to keep the file size down to a minimum. Always think of the end user when publishing images to the web. Unless they specifically want a large or high resolution image most users will grow impatient and leave your site before they've waited for the image to appear.

Links

Links can enhance the content on any website, making the information flow. Make sure that your links are easily recognisable and consistent throughout the site.

How to link

Links should describe the destination and make sense when read out of context. Therefore, it is best to avoid the use of 'click here or link here', for example. Links need to be descriptive to adhere with W3C guidelines which support the Disability Discrimination Act. For example:

BAD
<p>To access NHS Choice website click here</p> <p>Link here to access January board papers</p> <p>To view this month's board papers</p>

GOOD
<p>Visit NHS Choices website</p> <p>Access a copy of January's board papers</p> <p>Download this month's board papers</p>

Where to link to

NHS sites should not normally link directly to commercial sites.

Commercial sites may contain biased or unbalanced content, e.g. promoting particular products, services or companies over others. You can deny endorsement through a disclaimer but readers may still believe the link implies some level of approval.

6.0 CONSENT AND COPYRIGHT

Consent for Photographs

When you are taking photographs of people, be aware that in certain circumstances you should get them to sign a 'release form'. By signing that form, the subject agrees that you can use their image. In the case of NHS staff: if you are taking a shot of a large group of people, e.g. a group award ceremony or a department of staff at work at their desks, there's usually no need for release forms. But if you are taking a shot of one or two members of staff, where they are the focus of the image, you should get them to sign a release form.

When photographing members of the public, including patients, you should always get them to sign a release form. The only exception would be a photo with a lot of people in it: illustrating a situation rather than a person or persons. A shot of a hospital entrance with people coming and going, for example, wouldn't require release forms.

Copyright

If you want to use images or photographs from other sources on your web site or intranet, you must check whether you are allowed to use them. Be aware that most photographs have an owner somewhere. If you are looking for images on the Internet, the web site you find may include a statement allowing its material to be freely re-used, or used for specific purposes and/or with specific conditions. Look for a statement or link on the home page of the site, often labelled 'Copyright' or 'Conditions of use'. If in doubt, send an email to the site owner to ask for permission to use the image. A recommended resource for NHS users and NHS/health related imagery is available at <http://www.photolibrary.nhs.uk/>

If you would like any help or advice about the guidelines in this document, the Content Administrators at WHIS will be pleased to assist. Please e-mail them at wih-tr.content@nhs.net

For further knowledge on the following please view the recommended websites:

Web Content Accessibility Guidelines 1.0 <http://www.w3.org/TR/WCAG10/>
W3C Guidance <http://www.w3.org/QA/Tips/noClickHere>
Data Protection Act 1998 <http://www.legislation.gov.uk/ukpga/1998/29/contents>
Plain English Campaign <http://www.plainenglish.co.uk/>
useit.com – Jakob Nielsen's Website <http://www.useit.com/>
Gerry McGovern <http://www.gerrymcgovern.com/>