

Content Editor Training

Terminalfour for Content Editors



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Web content management

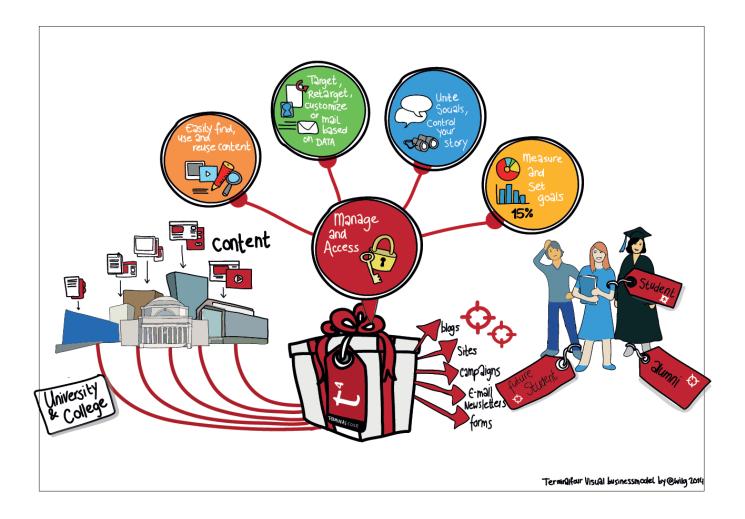
At a basic level, Terminalfour is used for building and maintaining large amounts of digital content.

Users at various levels can be given permission to add and modify content. All content goes through an approval cycle, at which point dedicated "approvers" review the content. In some cases this may be the authors who wrote the content; in other cases a more complex workflow may be used to allow several people to review the content.

Once content has been approved, it is ready to "go live". This happens in the publishing process. Page layouts (header/footer) and content layouts are wrapped around the content to ensure the content is displayed correctly.

One piece of content may be published to various channels. These are simply output mechanisms, like websites, mobile sites, paper publishing, etc. By applying the page layouts and content types, different displays can be achieved whilst still just producing one piece of content.

At the publishing stage, external data can also be incorporated. This could be information from a database, website or similar.



Log in

When a new User is created, they are assigned a unique username and password within Terminalfour. Single sign-on through directory services such as LDAP, SAML, Kerberos and CAS is also supported.

- > Log in to Terminalfour.
- > Open your user profile by clicking on Welcome in the black bar at the top right
- > To modify the profile, click **Profile**.

† 4	First name *	Vincent O'Malley
	Email address *	vincent.omalley@terminalfour.com
TERMINALFOUR	Current password	
Username	New password	
	Confirm password	
Password	Default language	English *
		English 👻
	HTML editor	TinyMCE -
Log in	Preview channel	None

Make a note of your URL

🖾 How to log in

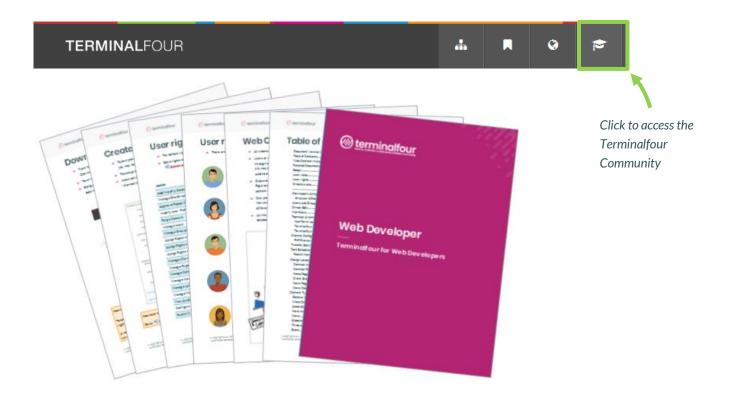
- 1. Open a web browser and navigate to your Terminalfour installation.
- 2. Enter your username and password; then click Log in.
- 3. Terminalfour opens. Click on your username in the top right corner to open your user profile:
 - a. You can change your Password.
 - b. If more than one Language is available, you can change the language. This will change the language of the site you work on when you log in.
 - c. You can select your preferred User Interface Language. This is used to set the interface language of Terminalfour; menu items, site structure and user options.
 - d. You can update your Email Address; this is used for notifications sent from Terminalfour.
 - e. If more than one HTML Editor is available, you can change editor. The default is TinyMCE.
 - f. If more than one Preview Channel is available, you can set a default channel. This is used when you preview your content to see how it will look on the live site.

Download training material

Training material for this course can be downloaded from the Training area of the Terminalfour Community.

Terminalfour Community is your source of all information about Terminalfour.

Being part of the Terminalfour Community gives you with access to all training material, documentation about the product, and the T4 discussion forum.



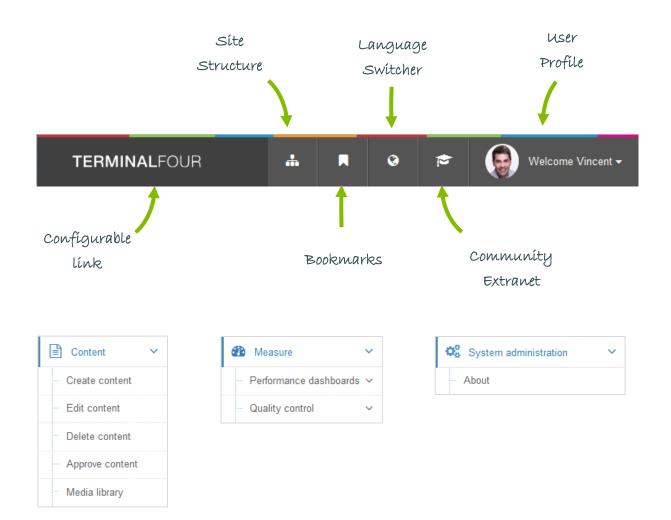
Be How to download training materials

- 1. To access the community area, click the Terminalfour Community icon 🞓 located towards the top right of the interface.
- 2. A new tab opens up, if this is your first time accessing the community area you will need to agree to the terms of use. Check the box to agree to the terms and click Access community.
- 3. Your trainer will show you where to download the materials required for this course.

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Terminalfour interface

- > The Terminalfour interface has been designed to be fully responsive, which means it can be used on a desktop, laptop, tablet, and/or mobile device.
- > Familiarize yourself with the interface.

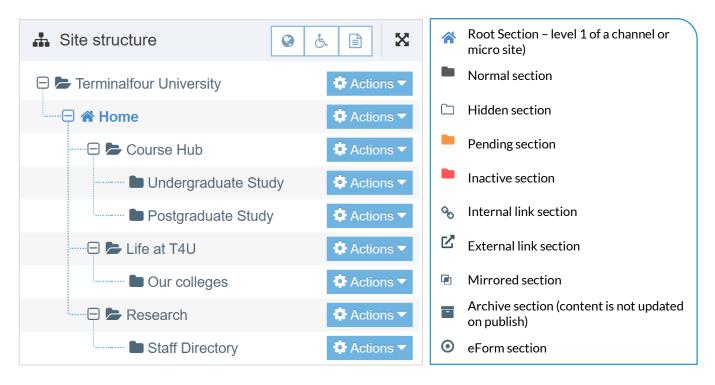


Site Structure

The first part of building a website is identifying at least the high level architecture. In Terminalfour this involves building a site structure consisting of sections.

There are a many types of Section and each type has an icon so you can identify it

Once the different options have been explained by the trainer, build a small Site Structure you can use as a base for your new website.



How to create Sections

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

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æ General	🗞 Content type	es h -Page Layouts	More 💌	
General	section de	etails		General section details
Sectior	Status Ar	g. News and events oproved Mark as link section Show in navigation	~	When creating sections, the only required element is Name. Additional elements are described below: Name: This is the name of your section and is typically used in the menu navigation and forms the basis of the URL for the published page (if an Output URI is not
Conter	ed settings	Archive section eForm section	its	specified). Status: There are three status levels: Approved: Sections are published when they have at least one approved Content Item. Pending: Pending Sections will not publish, even if the content within the Section is Approved. Inactive: Deleted Sections have an Inactive status. Sections can be restored by changing the status to Approved.
Output fi SEO key		g. my-filename.php		Mark as link section: Link Sections contain no content and instead link to another Section in the Site Structure or an external URL.
		one	~	eForm section : This option is used if you want to submit an eForm. Refer to the documentation for <u>eForms</u> for further details.
Aco	cess key			

Advanced settings

Content owner: Select the Content Owner from the list. If left blank, it will inherit from the parent section. The content owner can be used in workflows or get notified when content expires.

Output URI: Lets you specify the Uniform Resource Identifier (URI) as the destination of the new Section. Using this field improves the Search Engine Optimization (SEO) for this Section. Otherwise, with the field left blank, the Section's name is used when publishing.

Output file name: Specify the file name used for the page. When you leave this blank, the system uses the default file name configured in the Channel Settings.

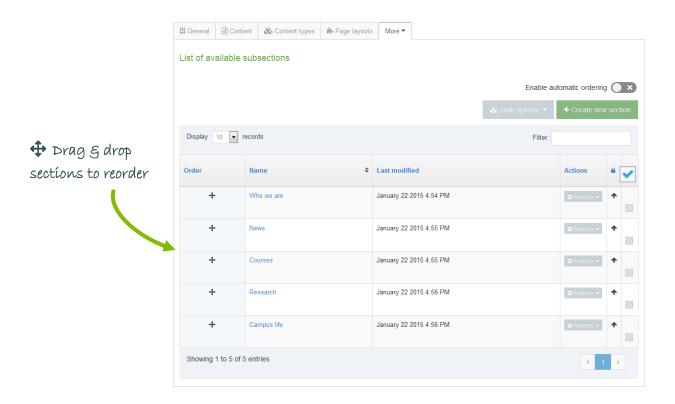
Default workflow: The default Workflow for this Section's content.

Access key: You can enter a single character, which can be used as a shortcut within a Link menu Navigation Object.



Move and reorder Sections

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



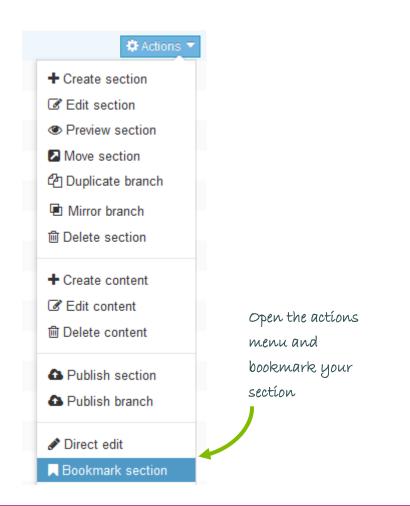
How to move and reorder Sections

- 1. To move a section, drag it with your mouse and drop it to the new location.
- 2. Click Confirm to save the change to the site structure.
- 3. To **reorder** sections, click the Site structure icon
- 4. From the Actions menu select Edit section.
 - a. Select the More tab > Child sections.
 - b. If you wish to use automatic ordering, slide the Enable automatic ordering toggle to the on position and select a method. By default, all sections are locked. Unlock the sections you wish to apply automatic ordering to. To do this, use the Unlock option in the Actions menu.
 - c. If you wish to manually move the sections, use the \oplus Order icon to move sections around.
 - d. Click Save changes before navigating away from this screen, as the changes will otherwise not be saved.

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Bookmark Sections

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



How to Bookmark Sections

- 1. Select Solver Select Solver Select Solver Select Solver Solver
- 2. Check the bookmarks tool to see that your section has been added as a bookmark.
- 3. Sections in Terminalfour can also be bookmarked, by clicking on Bookmark icon located towards the top righthand-side of the screen.

Add content

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

Content	» Configure co	ntent		
				Preview
ht General	🗞 Content	🚠 Channels	¢₿ Options	
Content	type : Tra	ining - Ad	d Content	
		Name *	Enter some text	
	ŀ	Heading *	Enter some text	
	Ма	in Body *	File • Edit • Insert • View • Format • Table • Tools •]
			p	Ĩ

Name of your main content type

How to add content

- 1. Select Create content from the 🗘 Actions 🗸 menu beside the section you wish to add content to.
- 2. If only one content type is enabled, this will open right away. Alternatively you need to select the content type you want to use.
 - a. The * next to the element identifies that the element is required.
- 3. Enter a Name for the content. This will not be displayed on the published page, but simply act as a name within Terminalfour and allows for user organization.
- 4. Use the Word file "Writing for the Web" and create a piece of content which looks as similar as possible to the original.
 - a. Open the Word file given to you by the trainer and copy the text.
 - b. Paste the text into the main body of your content. Some formatting may be necessary.
- 5. Preview to ensure you are happy with the result.

Direct Edit – links

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

Add page		E R M I N A L F U N I V E R S I		% +1 :	555 123 456	Site Map ⊠ info@t4u.edu	
\$	COURSE HUB	RESEARCH	H NEWSROOM	COMMENTS AND QUESTIONS	WRITING	FOR THE WEB	
Page settings							
✓	HOME / WRITING	FOR THE WEB					
Approval queue	Writing for the \	Veb		+ INSERT CONTENT			
l	Course Hub	>					
Analytics	Research	>	Writing for t	the Web			
	Newsroom			esigned to be run either independently			Click
O Preview	Student News		training to coach people based on existing conte	e on how to write effective web-based o ent.	content, either	from scratch or	INSERT CONTENT
			Web Content				
	The origins of on Earth	life	 What is web content How web content 				
Edit mode	Wednesday, March 11, 202 Students record charity single f mental health	2 0 rd	 Communication Standard vs. inter 	active			
G	mentar nealtri			+ INSERT CONTENT			
Exit direct edit							

🖼 How to use Direct Edit

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

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▷ Link to another page

Link to content in a page

P Link to external site

☐ Insert anchor

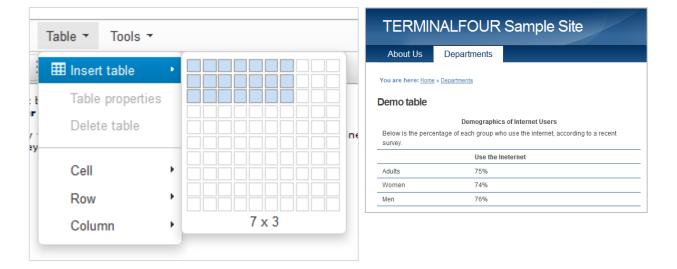
🖽 How to add links

- 1. External Link: e.g. http://www.terminalfour.com.
 - a. Type the text you wish to use as your link text; e.g. Terminalfour.
 - b. Highlight the text; then select Link to external site from the WYSIWYG.
 - c. The Link to external site Window opens; complete the details as required.
 - i. URL: enter the URL of the site you wish to link to.
 - ii. Text to display: enter the link text here.
 - iii. Title: enter information about where the link will send the user; this will aid user accessibility.
 - iv. Target: select how the link should open, e.g. within the same window or in a new window.
- 2. Link to another page: e.g. to one of your other sections.
 - a. Type and highlight the text you wish to use as the link text or simply place your cursor where you want the link inserted. Select Link to another page from the WYSIWYG.
 - b. A window will pop up displaying the Site Structure; navigate to the section you wish to link to and click on it.
- 3. Link to content in a page: e.g. to another attendee's "Writing for the Web" content.
 - a. Type and highlight the text you wish to use as the link text or simply place your cursor where you want the link inserted. Select Insert Content Link from the WYSIWYG.
 - b. A window will pop up displaying the Site Structure; click on the section that contains the content you wish to link to; a list of content will be displayed.
 - c. Click on the name of the content item you want to link to.
- 4. Click Save changes to save the content once complete.
- 5. Preview your content to review your links.

Tables

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

	Click here to begin creating a table
File - Edit - Insert - View - Format - Table - Tools	-
	₽-2? 🔳 🖤



🖾 How to add a table

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

History and Versions

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

ti General & Co Version histo	Ty for this piec		ອ Histor t	ГУ				□ Compare selected		Select two versíons of
Display 10 💌	records						Filter:			content and click
Name 🗘	Version \$	Owner	♦ Las	st modified	Last mo	dified by	Previous			Compare selected
Writing for the Web	0.2 ●	Inherited		January 2015 4 PM	vomalley		0.1	✿ Actions ▼		1
Writing for the Web	0.1	Inherited		January 2015 1 PM	vomalley		0.0	✿ Actions ◄	-	
Showing 1 to 2 of	Showing 1 to 2 of 2 entries									
Elem	ents where	2			Versio				Version 0.4	
chan	ges have						ing for the Web ing for the Web		Name Heading	Writing for the Web Writing for the Web
осси	red are				Main	body 💽			Main body	5 0
hígh	líghted ín W	,				prin	iting for the web is not the nt because people read di e of the impediments to o	ifferently on the web.		Writing for the web is not the same as writing for print because people reed differently on the web. One of the impediments to online reading is
yello	w					iti	ysical: It is harder to rea is to read on paper. /eb Content is: • Scanned, not read	ad on a screen than		physical: It is harder to read on a screen than it is to reed on paper. Web Content is: • Scanned, not read

Be How to modify content

1. Modify a piece of content.

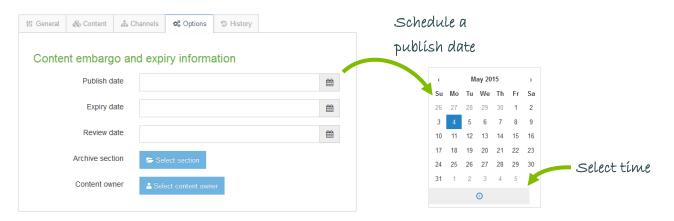
- a. Select Edit content from the 🔅 Actions 🗸 menu beside the section containing the content.
- b. Click on the content's name to open it.
- c. Make changes to the content and click Save changes.
- 2. Select History from the content's 🗘 Actions 🗸 menu beside the content.
- 3. Check the two versions of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

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Terminalfour confidential - not for distribution to 3rd parties

Content Options

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



How to manage Content Options

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

Content Options

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

Media Library

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



			Bulk actions	 + Add media
A Show categories		Q Search		:= :::
Display 10 🔻	records		Filter:	
Preview *	Name 🕈	Filename 🗢	Туре 🗢	Size 🗢 😫
		No results found		
Showing 0 to 0 of	0 entries			< >

🖾 How to add a Media Category

- 1. To add a Category, go to Content and select Media library.
- 2. The Media Library opens.

Expand the tree structure to find the "Training" category and click on the actions menu

- 3. Click Create sub-category.
- 4. Enter your new category name and click Save changes.
- 5. Click on your new category.

Uploading Images

> Upload an image to your media category.

靠 General			
Media details			Drag and drop
Media file (Max: 50000KB) *	Drop file here or click to choo	se	your image
Name *			terminalfour
Description / Alt text	e.g. A student sitting under a		DIGITAL CONTENT & WEB DEVELOPMENT PLATFORM
Advanced options	;		
Media type	Image	•	
Syntax highlighting language	HTML/XML	•	
Media language	 Fully independent 		
dependence	O Independent media file		
	 Fully dependent 		

🖼 How to upload images

To add media to your category, click Add media

- 1. Media details
 - a. Media file: click to select the relevant image.
 - b. Name: enter a name for your Image. By default, this is not output on the site, but is used only as a name in the Media Library to allow easy identification.
 - c. Description/Alt text: by default, this is used as the alt tag and should be filled in for images.
- 2. Advanced options
 - a. Media type: this will be automatically detected where possible. If an incorrect type is selected, select the media type from the list.
 - b. Syntax highlighting language: This does not apply to images, PDFs, etc.
 - c. Media Language Dependence:
 - i. Fully independent: the media is the same in all languages and can hence not be translated.
 - ii. Independent media file: the file and thumbnail exist independent of language. Other elements can be modified based on language.
 - iii. Fully dependent: all elements depend on language and can be translated.
- 3. Click Save changes.

Using Images

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

The web content merry-go-round

What do I do to stop my rage,

when everyone wants to be on the homepage? There's a solution I use; maybe you do as well? It's the wonderfully accommodating carousel.

It helps me satiate the vanity, of multiple departments that want to see, their precious content on page number 1, and this is where I have some fun...



🖾 How to use an image

- 1. From the Site Structure screen, select Edit content from the Actions renu beside the section containing your content.
- 2. Click on the content's name to open it.
- 3. Place your cursor where you wish to insert the image within the main body of the content; then select Insert file link or image 🖾 from the toolbar.
- 4. The Media Library opens.
- 5. Navigate to the category where you uploaded the image earlier.
- 6. Hover over the image thumbnail and click it.
- 7. The image is inserted into your content.

Image Variants

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

	esize						
Preview	Name *	Version \$	Status 🖨	Filename 🖨	Type 🗢	Size 🗢	
	Carousel id:31873	1.0	Approved	Carousel.jpg	Image	186.9 kB	Actions -
	Brightly painted wooden horses on a fairground carousel					& Select	media
Ob an in a d da						C Edit	
Showing 1 to	1 of 1 entries					Move	
						t Variant	S
						Downle	oad
						逾 Delete	

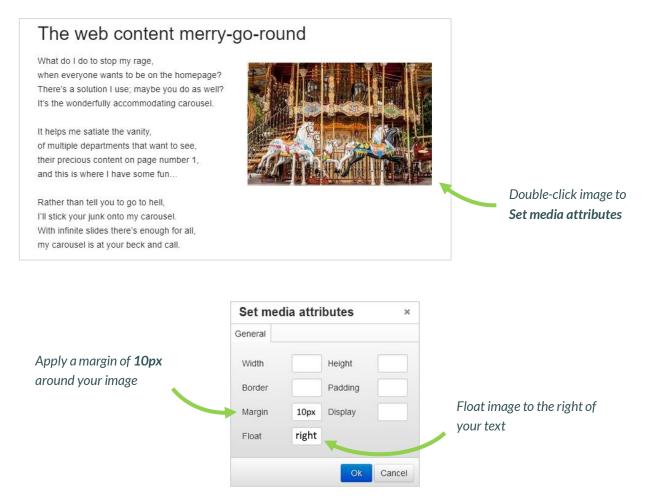
review 📤	Name 🗢		Variant name 🗢	Туре 🖨	Dimensions 🖨	Metadata 🖨	
	Carousel Brightly painted wooden horses on a fairground carousel	id:31873		Original			Actions -
	Carousel Brightly painted wooden horses on a fairground carousel	id:31879	custom	resize	300x200		Actions -

🖾 How to create variants of an image

- 1. From your content, click Insert file link or image
- 2. Locate the image in the Media Library, click 🗘 Actions 🗸 > Variants.
- 3. Enter a Variant name and a Description.
- 4. From here you can either **Z** Crop or **Resize** the image.
- 5. Click Save variant.
- 6. Add additional variants if needed.
- 7. Once you have added the necessary variants, click Cancel to exit Variants
- 8. To use a variant in content; click on your image and any variants associated with the image will be displayed.
- 9. Click Actions > Select media to add the image variant of your choice.

Image Attributes

If your Media Type Layout for images contains "style" options, you can set the Media Attributes in the content to specify Margin, Float, etc.



🖾 How to set Media Attributes

- 1. The image (or image variant) has been inserted in your content. If your Media Type Layout for images contains "style" options, you can set those from the content.
- 2. Double-click on the image to Set Media Attributes.
- 3. Specify the values you wish to set. In the example above, a margin of 10px has been set, and the image has been set to float right (wrapping the text around the image with the image floating to the right).
- 4. Click OK to return to the content screen.
- 5. Click Save changes to save the changes made to the content.



PDF Documents

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

Writing for the Web

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

This is some more text.

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

For more information check the guidelines: Writing for the Web Guidelines

Web Content is:

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

Bow to add PDF documents

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

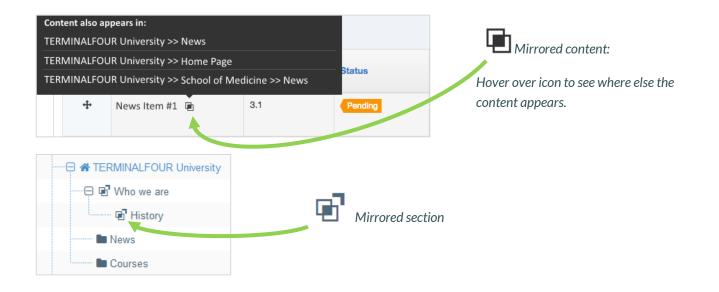
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- 5. To add media to your category, click Add media (the use of Name and Description is dependent on your Media Layouts):
 - a. Media file: click to select the relevant image.
 - b. Media type: this will be automatically detected where possible. If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

⊘ terminalfour

Mirror and Duplicate

- > Branches of the Site Structure as well as individual pieces of content can be Mirrored and Duplicated.
- > If you Mirror a piece of content, there is only one ID, and any changes made to the content will affect any and all versions of it.



🖾 How to Mirror and Duplicate

Mirror/Duplicate Content

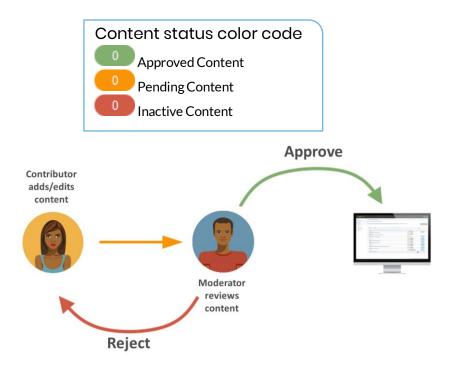
- 1. Select Edit content from the Actions menu beside the section containing the content you wish to mirror or duplicate.
- 2. Select Mirror or Duplicate from the Actions menu beside the content.
- 3. The Site Structure opens. Click on the Section you wish the mirrored/duplicated content to appear in. A small icon appears beside the mirrored content. Hover the mouse over it to see the various locations of the content. The duplicated content, however, will appear as new content.

Mirror/Duplicate Branch

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

Approve content

- > When content is added to Terminalfour, it needs to go through an approval process before it can be published; only published content will be visible on your website.
- > The content you have created so far is all pending approval. Ensure your content is approved.



How to approve content

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

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Feedback survey

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



Congratulations on completing the course

Please provide your feedback

Training feedback survey