

TerminalFour (T4)

STAFF PROFILES Training


Updated 14 March 2019

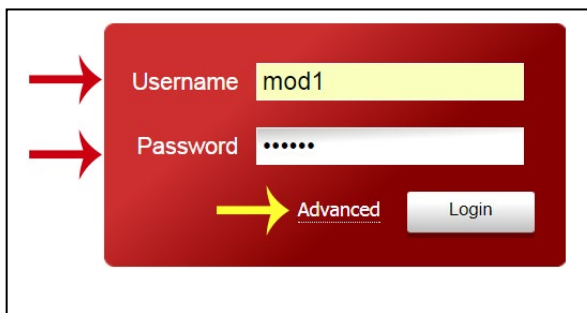
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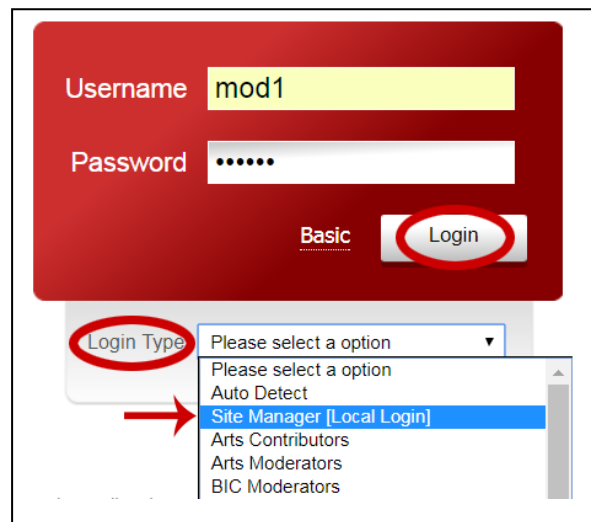
How to login

- 1) Open **Google Chrome** 
(**DO NOT** use **Internet Explorer**, it is not recommended due to compatibility issues)
- 2) Copy and paste this URL into the address bar:
<http://ucwcmsappl1u.canterbury.ac.nz/terminalfour/SiteManager>
- 3) Enter Mod1 for your **Username**, mod123 for your **Password** and click **Advanced**. Then select **Site Manager [Local Login]** from the **Login Type** dropdown and click **Login**



Username

Password



Username

Password

Login Type

- Please select a option
- Auto Detect
- Site Manager [Local Login]**
- Arts Contributors
- Arts Moderators
- BIC Moderators

Please note: The above login is for training purposes only. To edit your site after training, click the below link and log into the live server with your own username and password and select your given Login Type.

<https://wcmsedit.canterbury.ac.nz/terminalfour/SiteManager?ctfn=hierarchy>

Staff Profile (Content type)

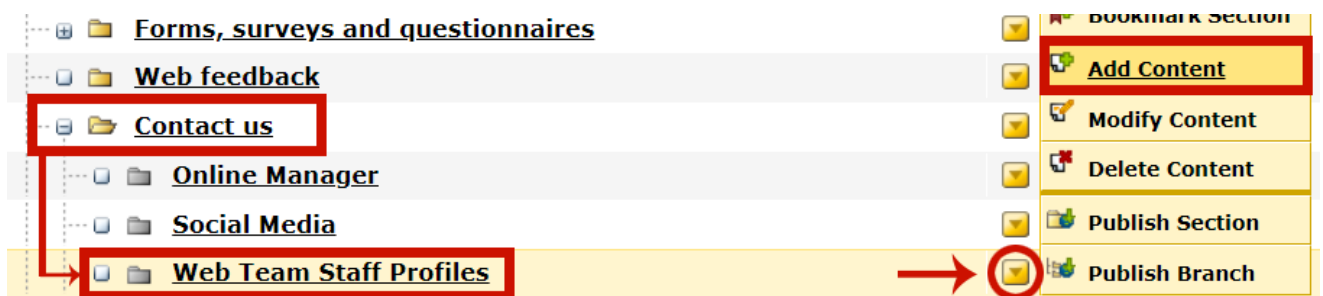
The **Staff Profile** content type is used to create **Staff Profiles** on People or Contact us pages. Information for **Staff Profiles** are imported from other systems and are created automatically. Some are editable by department in T4 (Name, Position titles, Profile Image) after import, others need to be updated from source (AD or SPARK).

Each site in T4 has its **own Staff Profile** section (where all your department staff profiles are kept), this section can be found inside the **Contact us** section. The individual Staff Profiles are added to T4 by site Moderators or Contributors.

Add Staff Profiles to your site (for a person who is a UC staff member)

In order to add a Staff Profile to your site, you need the person's user name (can be searched in Outlook) **OR** Employee ID (can be found on the staff ID card).

1. Login as a **Contributor or Moderator**
2. Locate the **Contact us** section and look for the **Staff Profiles** section for your department/college, for example, Science Staff Profiles or Web Team Staff Profiles section
3. From the **Yellow Dropdown menu** beside this section, select **Add Content**



4. Select **Staff Profile** from the **Choose a Content Type** screen

Choose a Content Type	
ASC Moderators	
Map - Point of interest	Add a location to a campus map
Academic Services Moderators	
→ Staff Profile	Shows small staff listing section with link the full profile. Multiple Staff list only limited fields.
Staff Profile Contact Card	Search for academic and general staff profiles by searching on a name or 'William').
Student profile (Postgraduate Student Bio)	Postgraduate Student profile

5. Enter the staff name in the **Name*** field (eg, Aron Carter). This field helps identify your content in T4 and does not display on the web.

Enter **Staff Username** (eg, abc13) OR **Employee ID** (eg, 12345) - you only need one or the other, not both. Click **Add**

The screenshot shows a web form with several tabs: 'General Information', 'Content' (circled in red), 'Placement', 'Channels', 'Options', and 'Linked Conte'. Below the tabs, the 'Content Type' is 'Staff Profile'. There is a red arrow pointing to a red 'Add' button with a dropdown arrow. Below that are several input fields: 'Name *' with 'Aron Carter' entered and a red arrow pointing to it; 'Default Staff Name'; 'Preferred Staff Name'; 'Staff Username' with 'abc13' entered and a red arrow pointing to it; and 'Employee ID' with '12345' entered and a red arrow pointing to it. A red 'OR' is placed between the 'Staff Username' and 'Employee ID' fields.

6. Check your email for a notification that the profile has been imported to T4. This will take 30 seconds or less.

7. Locate the newly created Staff Profile (eg, Aron Carter). You can now Modify/Edit the profile and make any necessary changes. **Name, Position Titles, and Profile Image are now editable in T4** as detailed below:

- a. **Default Staff Name** and **Default Position Title** come from HR People Soft and are automatically pulled to T4 to display on the web. This can be changed if you have a preferred name or preferred position title that you want to use. To change the **Default Staff Name** or **Default Position Title**, enter a

preferred name in the **Preferred Staff Name** field or preferred position title in the **Preferred Position Title** field. If these are left blank, the **Default Staff Name** and **Default Position Title** from HR People Soft will display on the web.

- b. **Default Profile Image** comes from SPARK and is automatically pulled to T4 to display on the web. This can be changed in T4 using the **Preferred Profile Image** field, this will overwrite the SPARK profile image. If your Staff Profile photo is exactly the same as your SPARK profile photo, update the data directly from the original source which is SPARK. Email grant.barrie@canterbury.ac.nz from the Research Office, and he will get your photo updated in SPARK for you.
 - c. If you want to modify/add details that came from other systems, modify the data directly from the original source, for example – Research Interests from SPARK. (See Data Sources section on page 16 for details)
8. **Check** and **Preview** your changes.
 9. Publish (**Update & Approve**) if you are happy with the result

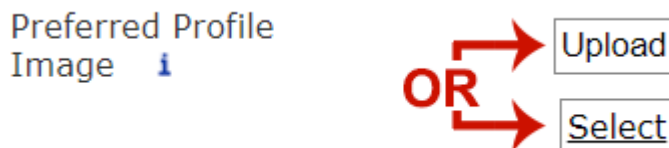
Add a manual Staff Profile (for a person who is NOT a UC staff member, eg, external lecturers, adjuncts, casuals, and visitors)

If the person you want to add **ISN'T** a UC staff member, **doesn't** have a UC username or Employee ID, they can be added manually. All fields have to be entered manually in T4 as their information do not already exist in other UC systems, therefore are not automatically pulled through to T4.

1. Login as a **Contributor** or a **Moderator**.
2. Locate the **Contact us** section and look for the **Staff Profiles** section for your department/college, for example, Science Staff Profiles or Web Team Staff Profiles
3. Mouse over the **Yellow Dropdown menu** beside this section and select **Add Content**.
4. Select the **Staff Profile** content type

<u>Staff Profile</u>	Shows small staff listing section with link the full profile. fields.
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5. Enter the appropriate staff member details:
 - a. Enter their name in the **Preferred Staff Name** field
 - b. Enter their position title in the **Preferred Position Title** field
 - c. Enter their email address in the **Additional Email** field
 - d. In the **Preferred Profile Image** field, either click **Select** (the photo must already be in the **Media Library**) or **Upload** to add a photo. The photo should be 900x1000 px

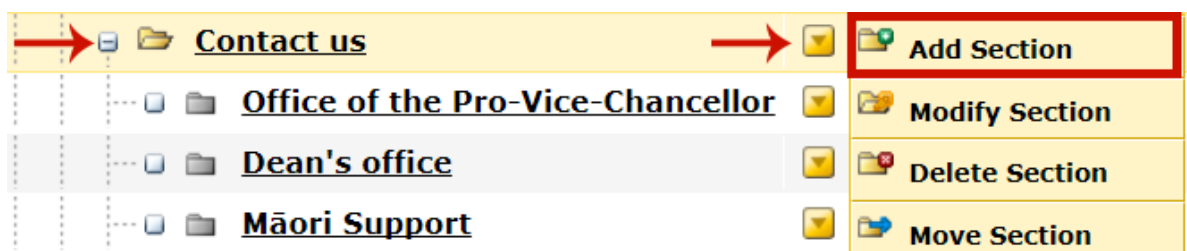


- e. Enter other relevant information if available
6. **'Preview'** to make sure you are happy with the result.
 7. Click **Update** to save or **Update & Approve** to publish.

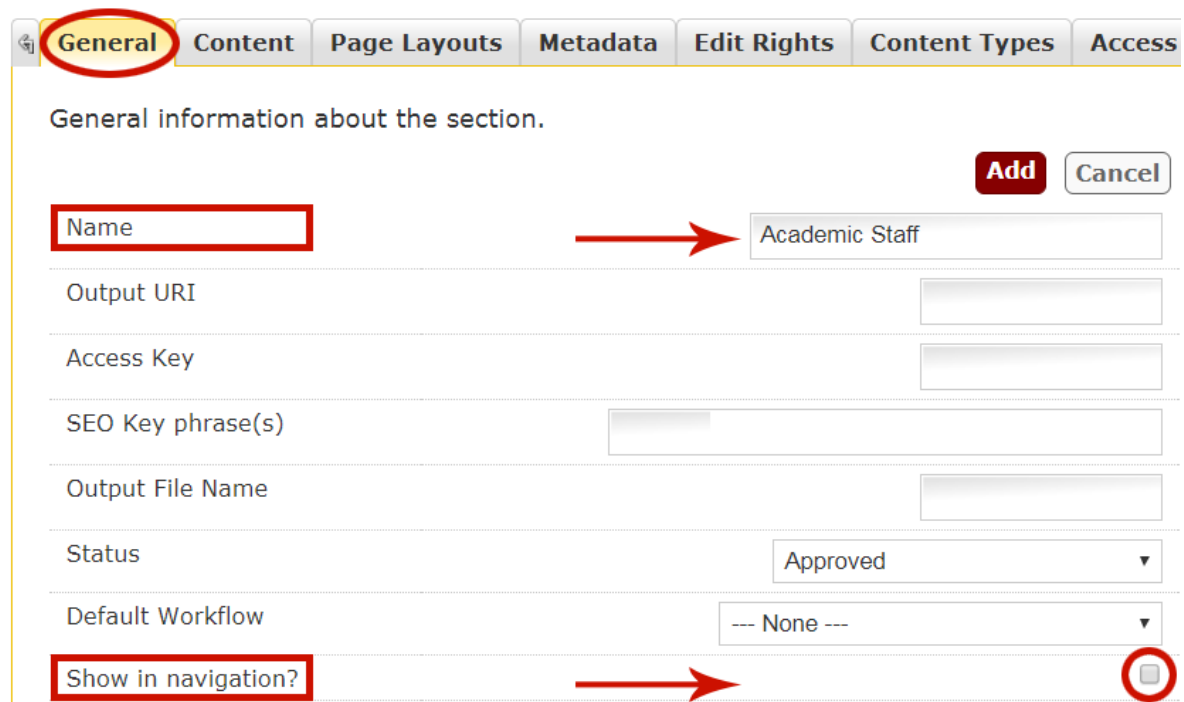
Create Staff Profiles listing using Staff Profile Contact Card content type

To create a listing of **Staff Profiles** on the people or contact us pages, we use the **Staff Profile Contact Card** (steps 1a-l below) and **Related Contents** (steps 2a-h below) content types:

1. You need to create a new section for the **Staff Profile Contact Card** content types to live in:
 - a) Mouse over the **Yellow dropdown menu** beside the **Contact us** section in your site and select **Add Section**

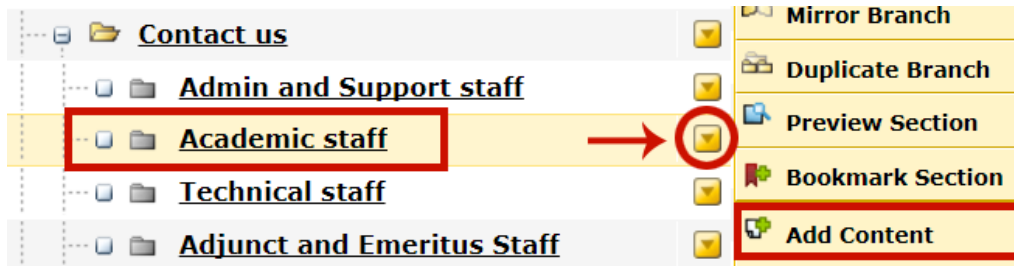


- b) On the **General tab**, give this new section an appropriate name such as **Academic Staff** or **Technical Staff** and untick the **show in navigation?** tick box, the section/folder will now look grey.



- c) Click the **Add button**

- d) Add the **Staff Profile Contact Cards** to this section by hovering over the **Yellow dropdown menu** of your new section and select **Add Content**



- e) Select the **Staff Profile Contact Card** content type

Staff Profile Contact Card Search for academic and general staff profiles search for 'will', finds all staff called 'William').

- f) In the **Name** field, enter the staff member name.

Name * 

- g) In the **Staff Profile** field, click the **Select** button.

- h) The **Staff Profile Lookup** window will appear. **Search** for the staff member by entering a name in the search box and select a **Location** (department where the staff member belongs). Click the **Search** button, then select the staff member from the list of search results

Staff Profile Lookup

Search for academic and general staff profiles by searching on a name or part of name (for example: a search for 'will', finds all staff called 'William').

You can filter the result by choosing a location (for example: searching on 'College of Arts' limits the result to staff in that College. If the person you are searching for is not in your search results, check other possible locations).

Location





- Steven Aitken (Select)
- Steven Lewis Graham (Select)
- Steven Marsh (Select)
-

i) The name of the person now appears in the **Staff Profile** field

Staff Profile * ⓘ 

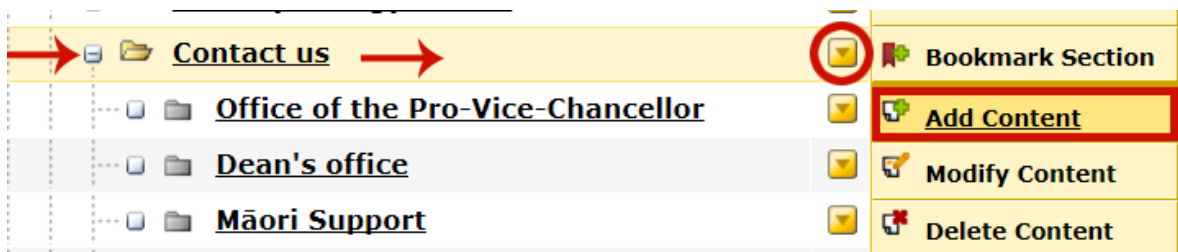
j) **Optional step:** You can overwrite the details from the original source by entering the details on the form. Leave as blank if you want to use the original value. The data will only appear on the contact card layout and **NOT** on the full staff profile.

k) **Preview** to make sure you are happy with the result

l) Click **Add** to save

2. Create a **Related Contents** content type in the main section (**Contact us**) to display the **Staff Profile Contact Cards** (step 1 above):

a) Mouse over the **Yellow Dropdown menu** beside the **Contact us** section within your site and select **Add Content**



b) Select the **Related Contents** content type

c) Add a name in the **Name** field, eg, Academic Staff (Related Contents) to help identify your content – this does not display on the web.


Name * ⓘ

d) In the **H2 Heading** field, add a meaningful heading, eg, Academic Staff. This will appear above your Staff Profile Contact Cards/listing

H2 Heading ⓘ

e) From the **Content Type dropdown**, select **Staff Profile Contact Cards** (if you want to display their additional position title and additional email only) or select **Staff Profile Research Cards** if you want to display their fields of

Research

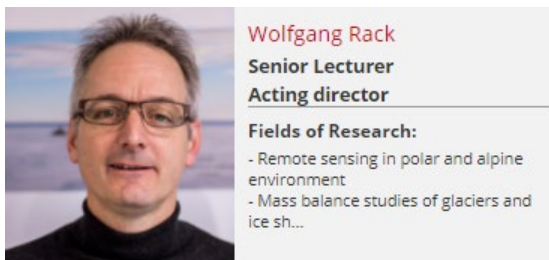
Content Type  Staff Profile Contact Card ▼

Examples:

1. Staff Profile Contact Card displays their position title and contact details:



2. Staff Profile Research Card displays their fields of Research only if the Fields of Research is available. Otherwise, the Staff Profile Contact Card will be displayed:



f) In the **Child Section** field, click **Select** to browse and select the new section that you created in step 1 above.

Child Section  Select Section  Select

g) **Preview** to make sure you are happy with the result.

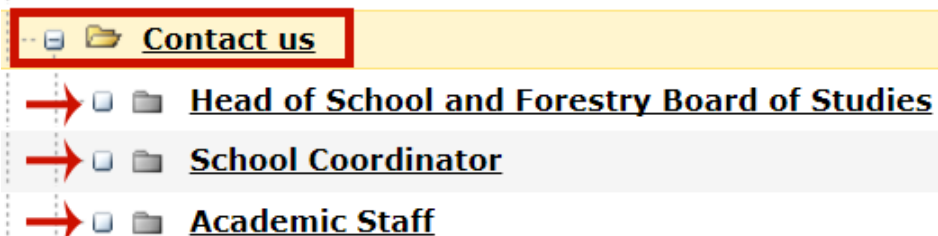
h) Click **Add** to save.

Examples of Staff Profile pages as they appear on the web:

- Full staff profile / personal page
<http://www.canterbury.ac.nz/arts/contact-us/people/aaron-beehre.html>
- Staff listing using contact cards
<http://www.canterbury.ac.nz/science/schools-and-departments/biological-sciences/contact-us/>

Modify a Staff Profile Contact Card

1. Locate the section where the content type **Staff Profile Contact Cards** are kept inside your site, they are usually inside the **Contact us** section



2. Locate the section you want to edit, for example **Academic Staff**, mouse over the **Yellow dropdown menu** beside the section and select **Modify Section**
3. On the **Content tab**, locate the name of the person you want to edit, mouse over the **Yellow Dropdown menu** beside name and select **Modify**
4. The details for the person will display, modify/add to the existing details as appropriate, for example, **Additional Position Title**

General Information **Content** Placement Channels Options Linked Content

Content Type: **Staff Profile Contact Card**

Update **Preview** **Cancel**

Name *

Staff Profile * **Select** **Clear**

Position Title

Additional Position Title

Physical Address

Phone

Internal Phone

Mobile

Email

Additional Email

Other Information

Update **Preview** **Cancel**

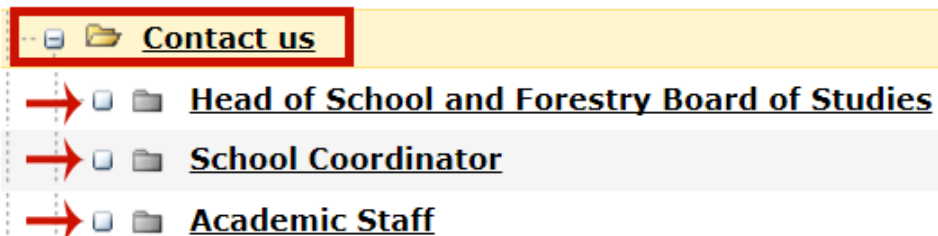
5. Click **Preview** to make sure you are happy with the result.
6. Click **Update** to save.

Note: The changes will only appear on the **Staff Profile Contact Card** NOT on the **Staff Profiles**

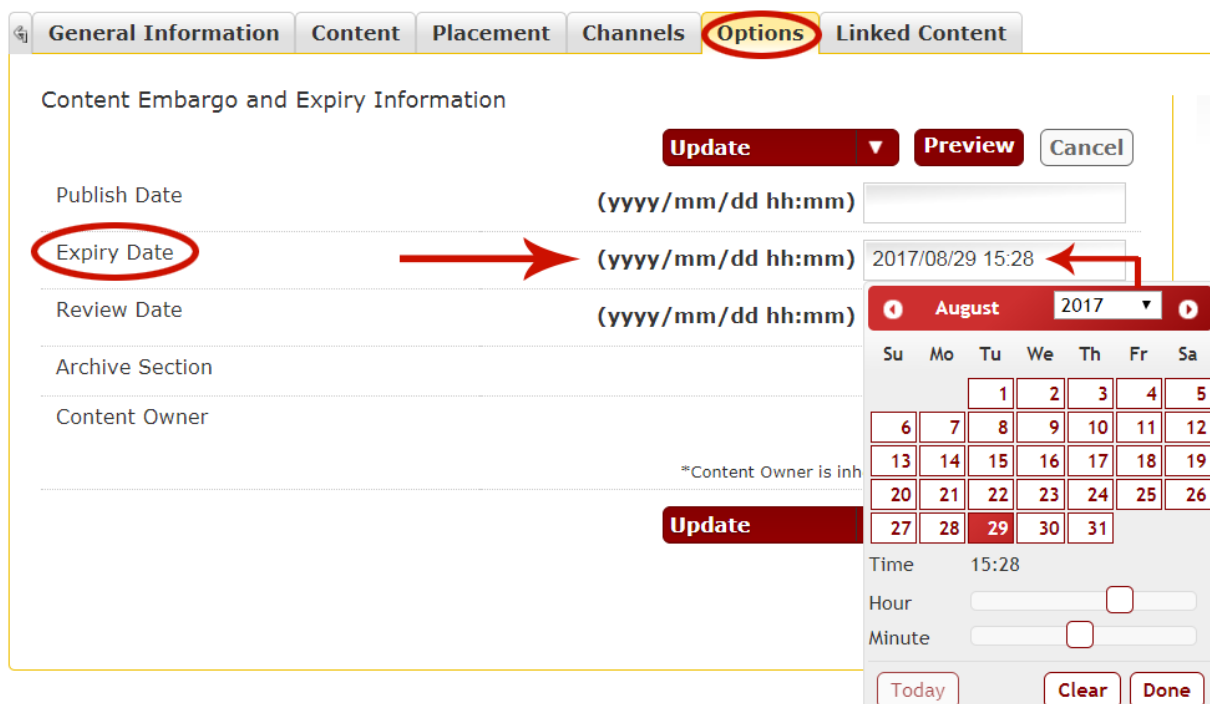
Remove a Staff Profile Contact card

If, for some reason, the content needs to be kept for later use, set an **Expiry Date** instead of **Delete**.

1. Locate the section where the content type **Staff Profile Contact Cards** are kept inside your site, it is usually inside the **Contact us** section



2. Locate the section you want to edit, for example **Academic Staff**, mouse over the **Yellow dropdown menu** beside the section and select **Modify Section**
3. On the **Content tab**, locate the name of the person you want to expire, mouse over the **Yellow Dropdown menu** beside name and select **Modify**
4. Click on the **Options** tab, click on the **Expiry Date** field, the date pop up will appear, select a date and set the time from the date pop up.



Content Embargo and Expiry Information

Update Preview Cancel

Publish Date (yyyy/mm/dd hh:mm)

Expiry Date (yyyy/mm/dd hh:mm) 2017/08/29 15:28

Review Date (yyyy/mm/dd hh:mm)

Archive Section

Content Owner

*Content Owner is inh

Update

Time 15:28

Hour

Minute

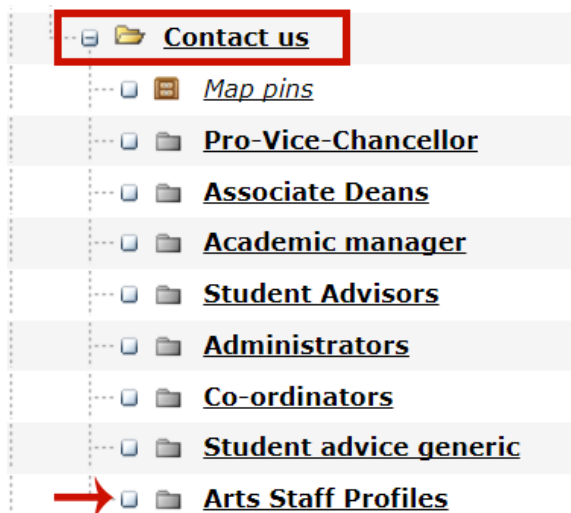
Today Clear Done

5. Click **Update** to save

Modify a full Staff Profile

Staff profiles are imported from other systems and are created automatically.

1. Locate your Department/College Staff Profiles section (eg, **Arts Staff Profiles**) where the content types **Staff Profile** are kept for your site, it is usually inside the **Contact us** section



Please note: Staff Profile can also be edited by clicking on the Blue Person Icon inside the 'Staff Profile Contact Card'

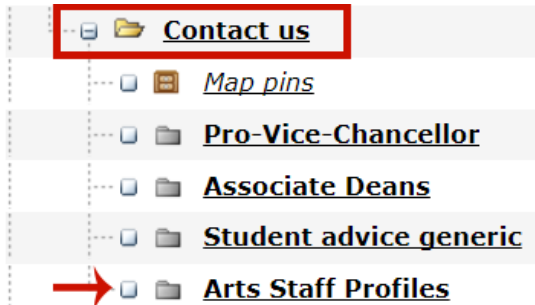
2. Mouse over the **Yellow dropdown menu** beside this Department/College Staff Profiles section (eg, **Arts Staff Profiles**) and select **Modify Section**
3. On the **Content Tab**, locate the name of the person you want to edit. Mouse over the **Yellow Dropdown menu** beside the person's name, and select **Modify**
4. The details for the person will display, modify/add to the existing details as appropriate.

Note: If you would like the salutation to appear before the name – the T4 Display Salutation field must be set to “Yes”. Staff profiles are automatically imported from other systems and regularly updated every night. With the exception of Name, Position Title and Profile Image, you can only modify/add fields that are not imported from other systems. If you want to modify/add details that came from other systems, modify the data directly from the original source, for example – Research Interests from SPARK. (See Data Sources section on page 16 for details)

5. Click **Preview** to make sure you are happy with the result
6. Click **Update** to save

Remove a Staff Profile from your site

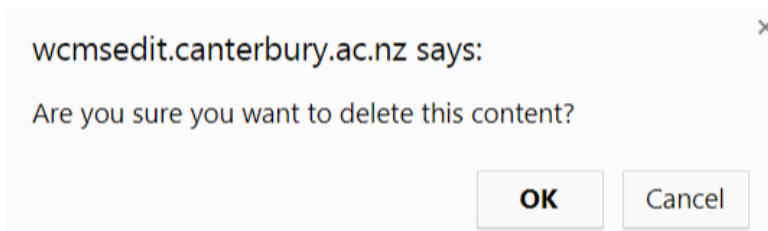
1. Locate your Department/College Staff Profiles section (eg, **Arts Staff Profiles**) where the content type **Staff Profile** are kept for your site, it is usually inside the **Contact us** section



2. Mouse over the **Yellow dropdown menu** beside this Department/College Staff Profiles section (eg, **Arts Staff Profiles**) and select **Modify Section**
3. On the **Content Tab**, locate the name of the person you want to remove. From the **Yellow Dropdown menu** beside the content name, select **Delete**

Name	Version	
<input type="checkbox"/> Steve Christopher Backe-Hansen *	0.0.19	<ul style="list-style-type: none"> Duplicate Move Delete History
<input type="checkbox"/> Scott Mansfield *	22.0	<ul style="list-style-type: none">
<input type="checkbox"/> Tracy Anderson *	0.0.19	<ul style="list-style-type: none">

4. This message will appear



Click **OK** to confirm

5. The staff profile **Status** will change from **Approved** to **Inactive**

Name	Version	Status
<input type="checkbox"/> Steve Christopher Backe-Hansen	1.0	Approved
<input type="checkbox"/> → Scott Mansfield	46.0	→ Inactive
<input type="checkbox"/> Tracy Anderson	2.0	Approved
<input type="checkbox"/> Phan Vong	1.0	Approved

Add contact us index links

To create the index links on the [Contact us](#) pages, we need to create a **Contact us index** content type, this displays the **Related Contents** that are in the section. The name of the Related Contents will be displayed as the index links, for example:

[OFFICE OF THE PRO-VICE-CHANCELLOR](#) | [ASSOCIATE DEANS](#) | [ACADEMIC MANAGER](#) | [STUDENT ADVISORS](#) | [ADMINISTRATORS](#) | [COORDINATORS](#)

1. Locate the **Contact us** section within your site, mouse over the **Yellow dropdown menu** beside the section and select **Add Content**
2. Select the **Contact us index** content type

[Contact us index](#) Add index links on contact us page based on Related Contents

3. In the **Name** field, enter this text "Contact us index"

General Information Content Placement Channels Options

Content Type: Contact us index

Name * [i](#) [Add](#)

[Add](#)

4. Click **Preview** to check the index on the page. Make sure this appears on the top of your Contacts page above the Staff Profiles Contact Cards
5. Click **Add** to save.

Data sources for Staff Profiles

Field names	Source	Explanation
Name *	Manual in T4	Helps identify your content in T4 and does not display on the web.
Default Staff Name	HR People Soft	Display name by default – from HR. Displays if the Preferred Staff Name field is blank
Preferred Staff Name	Manual in T4	Overwrites Default Staff Name field
Staff Username	Manual in T4	Can be found in Outlook
Employee ID	Manual in T4	Can be found on your staff card or contact HR
Display Salutation	Select Yes or No	Display the salutation from HR
Salutation	HR	Displays if Display Salutation is selected Yes
Default Profile Image	SPARK	Display image by default – from SPARK. Displays if the Preferred Profile Image is blank. Research Office contact grant.barrie@canterbury.ac.nz
Preferred Profile Image	Manual in T4	Overwrites the Default Profile Image field
Default Position Title	HR People Soft	Displays if the Preferred Position Title field is blank
Preferred Position Title	Manual in T4	Overwrites the Default Position Title field
Additional Position Title	Manual in T4	Shows an additional Position Title
Iwi	Manual in T4	Updates by departments
Te reo	Manual in T4	Updates by departments
Email	Active Directory	Contact IT for updates, create an Assyst Ticket
Additional Email	Manual in T4	Shows an additional email address
Physical Address	Active Directory	Contact IT for updates, create an Assyst Ticket
Phone	Active Directory	Contact IT for updates, create an Assyst Ticket
Internal Phone	Active Directory	Contact IT for updates, create an Assyst Ticket
Mobile	Manual in T4	Updates by department
Linkedin Profile URL	SPARK	Update in SPARK
Courses	CIS	Link courses to the CIS. Update in Course Maintenance
Profile Quote	SPARK	Update in SPARK
Qualifications	SPARK	Update in SPARK
Memberships	SPARK	Update in SPARK
Other Information	Manual in T4	Updates by department
Awards	SPARK	Update in SPARK
Awards display	Manual in T4	To overwrite the Awards field
Profile Link	Manual in T4	Link to external personal page
Research Interests	SPARK	Update in SPARK
Field of Research	SPARK	Update in SPARK
Research, Scholarly or Creative Works	SPARK	Update in SPARK
Additional Image	Manual in T4	To display in content blocks
Display Full Profile	SPARK	
Myscheduler ID	Manual in T4	To make an appointment
Researcher Id	SPARK	