TRAINING
CREATING & POSTING A NEWS RELEASE IN EPA'S WEB CMS

Office of Public Affairs, AO

This training is for...

- Anyone who will *publish* a news release.

- This generally includes:
  - <u>HQ press officers</u> in AO.
  - <u>Regional Public Affairs Directors and staff.</u>
  - <u>Contractors</u> who post news releases under the direction of EPA staff.

- <u>New users</u> may receive access with approval of OPA or their regional PAD.

This training will cover:

How to post an EPA news release online, including:

- Basic info you need to know first.
- Logging in.
- Creating a draft news release.
- Publishing the draft news release.
- Finding the published news release.
- Making edits and re-publishing a news release.
- Where to get help or how-tos.

This training <u>won't</u> cover:

- the authority, policy, or process to <u>develop or issue</u> a news release.

- the content of a news release.

EPA news releases are generally managed in the Office of Public Affairs, Office of the Administrator.

The Public Affairs Director (PAD) oversees news releases for that EPA region.

What is a "news release"?

The primary audience for news releases is reporters.

Typically, EPA news releases are:

- A press release

- A news brief

- A media alert; media advisory

- A statement or desk statement

- Occassionally: Foreign language, usually Spanish

Each type uses the same "News Release" entry form.

This training assumes…

… you use Word, maybe email, to develop a news release, including writing, review and approval, adding hotlinks, etc.

… you know little or nothing* about HTML, EPA's Web Content Management System or "CMS", or other web things.

*If you are already familiar with EPA's Web CMS, you will have a small learning curve. HOWEVER, publishing a news release requires <u>a couple of unusual steps you need to know.</u>

A news release needs…

Headline (max 255 characters)
Release Date
Body
Subject
Press Office (Region #, or AA-ship if HQ)
Press Officer (name, email, phone)
Certain tags and metadata settings, depending.

OPTIONAL BUT AVAILABLE TO YOU:
Secondary Headline
Geographic Area or Location – *this is NOT EPA Region.*
Non-English news releases – a couple of extra steps.

Use a **browser** <small>(until spring 2016 we used Lotus Notes)</small>

- **Use Chrome for the news releases site.** Firefox is OK too if you already have it.

- You should not depend on *Internet Explorer* (IE) to create and publish news releases. IE is unpredictable in Web CMS.

- Contact your help desk to get Chrome installed. If they give you flack, see the OEI waiver for installing Chrome for this purpose. More info: *intranet.epa.gov/newsreleases*

8

Technical note

- What you're actually doing is **creating a web page in EPA's "News Releases" web area.**

- This isn't too different from creating a news release in Notes, but there are improvements.

- Due to time, *this* training will deliberately skip many details about EPA's Web CMS.
More about Web CMS at epa.gov/webguide

Just so you know...

- Your news releases will be in the system **along with everyone else's**.

- You (or your region) don't have your own separate set of news releases.

- You use the ***Group Dashboard*** to manage your news releases. *More on this later.*

Web CMS Terminology

PLEASE READ THIS – this is important for using Web CMS.

- **Web CMS** = EPA's web content management system.

- **Draft** = <u>the first version</u> of a new news release that you first create and **save**. SAVING DOESN'T PUBLISH.

- **Publish** = to <u>go live, online so the public can see it</u>. The news release doesn't go live until you *publish. Saving is not publishing.*

- **Unpublish** = <u>to take it offline</u>. This doesn't delete the revision inside Web CMS.

- **Revision** = <u>subsequent versions</u> of the published version, after you make edits. If you edit a published version, those edits don't automatically appear online.

- **Republish** = if you make changes, you must re-publish each time. <u>Your changes will not appear online unless you publish again.</u>

Telework? Remote Log-In!

- You should be able to log in remotely (like, from home) to the Web CMS.

- It should be accessible once you log-in and you can access the EPA Intranet in your browser.

- Contact your usual help desk for remote log-in or telework stuff.

Log into the EPA Web CMS.

- Go to https://wcms.epa.gov/user
- Use your regular EPA LAN user ID and password.
- Memorize or bookmark this URL.

After you log in…

- You will be on "EPA Dashboard" page. For now, ignore all the system messages and things on the page.

- Click the link for "News Releases" under "My Web Areas"

My Web Areas

News Releases

- You will be taken to the "home" news releases page.

- If you don't see the "News Releases" link, you don't have rights to create or post a news release. **Contact us.**

Fix the "Admin Info" thing

- If you see a WHITE "Admin Info" button at top right, **click it.**
- It should turn orange, and edit controls should appear.
- **Click the little green "Set" or "Save" button.**
- The green button will disappear. You should never have to do this again.

Its purpose is merely to show or hide the editing controls so you can have a clean view of the draft.

Next, do one of two things:

To create a new news release, click the **Create Content** button.

To manage existing (draft, revisions, published) news releases, click the **Group Dashboard** button. *Using the Group Dashboard comes later in this training.*
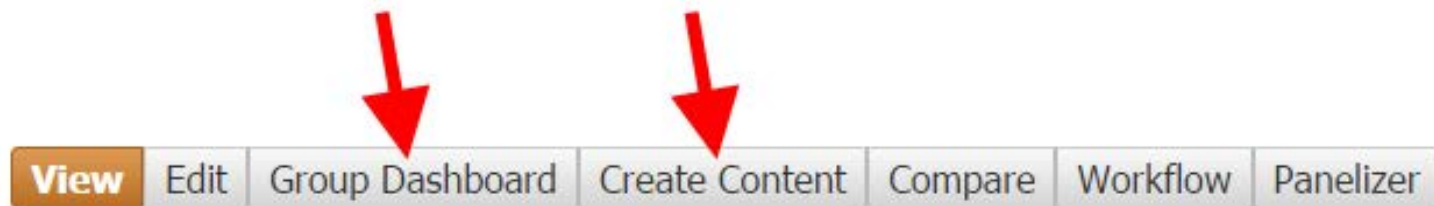
IMPORTANT - PLEASE:

- **Do not click Edit or Unpublish on this page.** These controls are not related to your news release.

- Suggest you avoid the "EPA Dashboard" at top left. It is for ALL EPA web files. **Use the "Group Dashboard" – is similar but is just for news releases.**
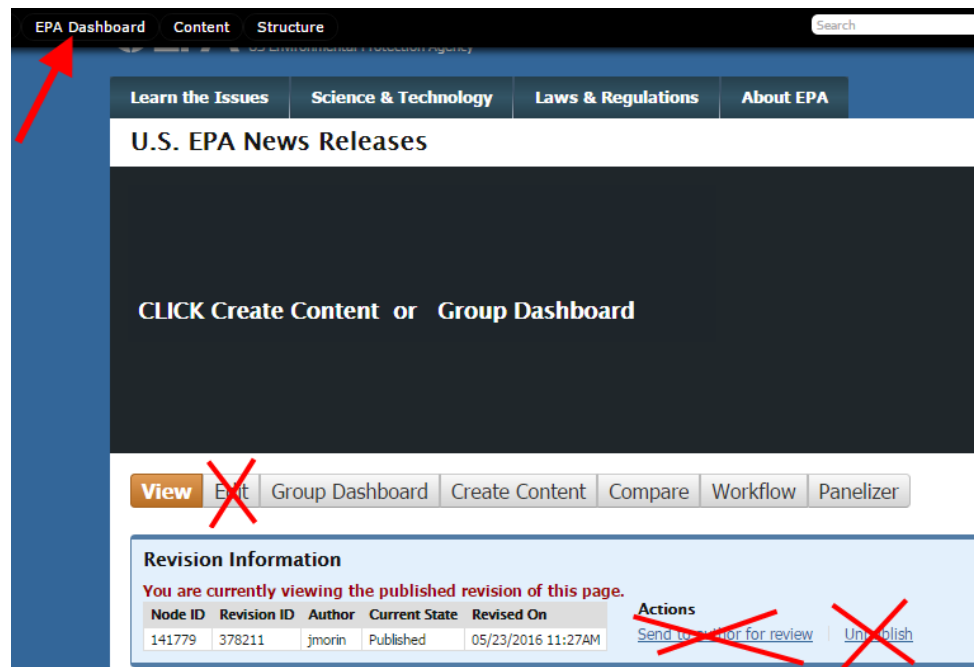
On the "Create Content" page

- **Click "News Release" content type.**
  IMPORTANT: Do not use Basic page *or any other type. The other types do not support all the information or formatting for the news release system.*

- Nex

Create Content for *News Releases*

| View | Edit | Group Dashboard | **Create Content** | Workflow | Panelizer |

- Basic page
- Document
- Event
- News Release ⟵
- Regulation
- Webform

THE FORM.

- Ta-da! This is where you start to create the news release.

Home

Create News Release

Headline *

Secondary Headline

WEB AREA *

TYPE OR PASTE IN THE HEADLINE.
Secondary Headline: Optional.

You may type or paste. It's a text-only field.

NOTE
- Headlines are automatically set. You can't change font size or type.

- Headline limit: 255 characters. If exceeded, Web CMS will just cut off the text. There's no way around this.

- *IMPORTANT:* ***Don't change settings in the web area box.*** *They are used by the Web CMS to put your news release in this web area.*

FYI: Most of the headline you enter will become the URL for the news release.

page title = URL, except small words.

EXAMPLE:

If you use this headline...
EPA Releases the First of Four Preliminary Risk Assessments for Insecticides Potentially Harmful to Bees

...then the URL will be something like:
epa.gov/newsreleases/epa-releases-first-four-preliminary-risk-assessments-insecticides-potentially-harmful
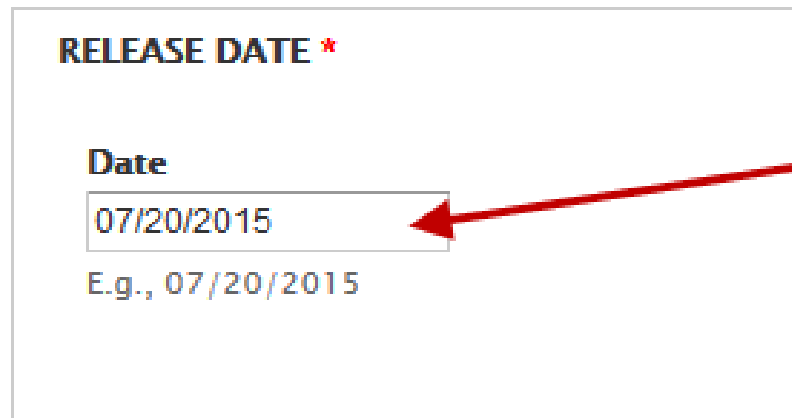
The URL will cut off at 100 characters including "news releases." Just so you know.

ENTER THE DATE
====

The **Release Date** will automatically appear as today's date.

You can keep it, or change it to any date.

RELEASE DATE *
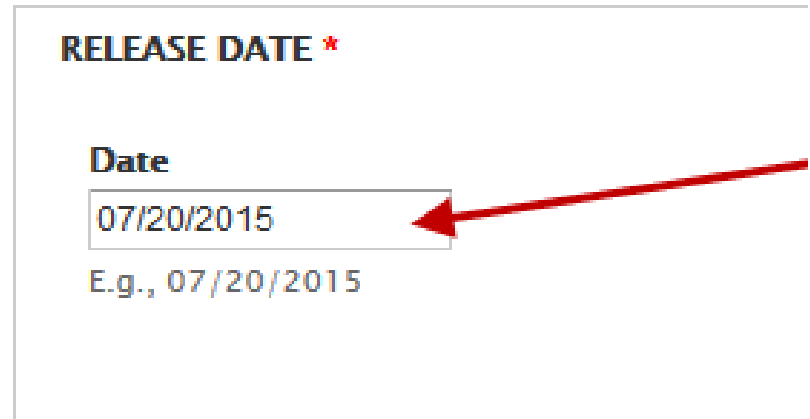
Date

07/20/2015

E.g., 07/20/2015

NOTE ABOUT THE DATE

RELEASE DATE *

Date

07/20/2015

E.g., 07/20/2015

THIS DATE IS:
- It is the date used for chronology, and the search function.
- It is text only. It won't change if you edit and re-publish.

THIS DATE IS NOT:
- It's <u>not</u> a timer to automatically publish later.
- It's <u>not</u> the physical publish date (in page footer).

ADD THE BODY

- **Type or paste the news release from Word into the large "Body" field.**

- **Keep to plain text as much as possible.**

- Just paste, e.g. Ctrl-V. Don't use the "clipboard" buttons.

Body (Edit summary)

click anywhere in here to type or paste
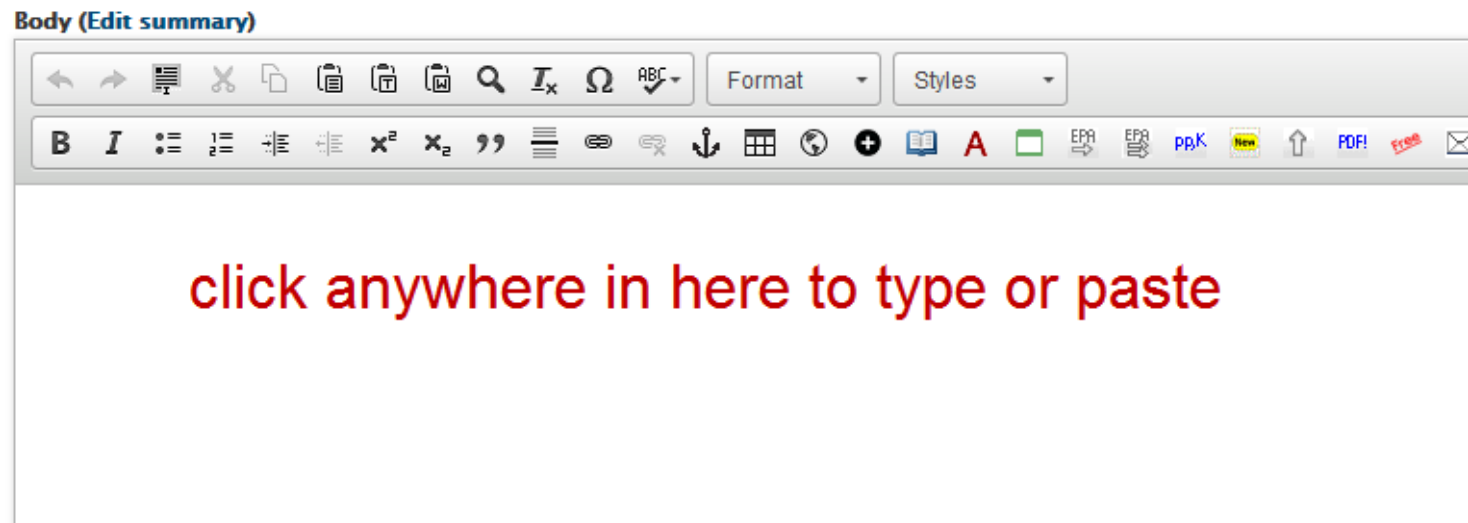
About formatting
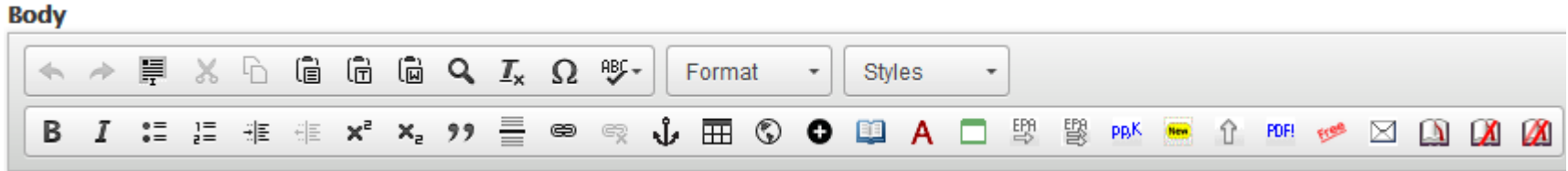
Body

- The body section includes edit tools for text style, bold, italics, super/sub scripts, links, table insert, or other things.

- <u>You should use these very sparingly.</u> Suggest you format your news release in Word, then paste into Web CMS.

Wait! Are you missing the edit bars?
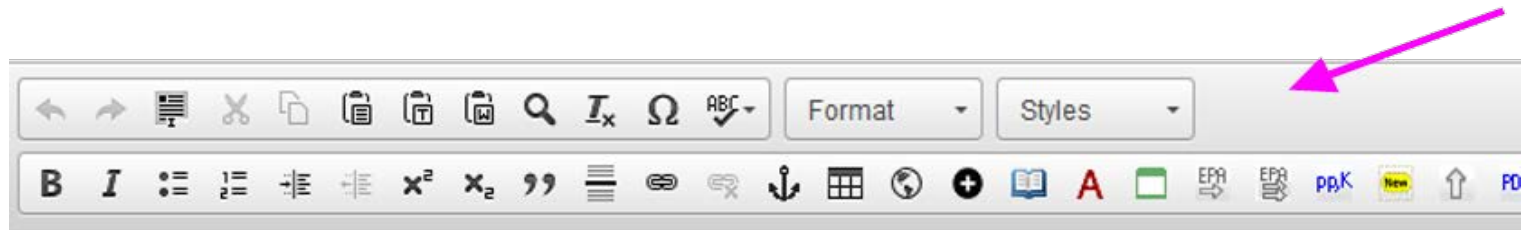
- If you are using **IE** and you don't see the edit bars above, **STOP. You should not use IE for news releases.**

- **THE FIX: ask the help desk to install Chrome on your computer or use Firefox if you have it.**

More information about browser type and the OEI waiver: http://intranet.epa.gov/newsreleases

Got Multimedia?

- The body of the news release is where you can add special features like photos, sound bites, or embed a video. This is optional and up to the discretion of your news director.

- If you have A LOT of special features or info, consider creating a "media kit" – a separate, non-news-release page.

- Remember – you will ALSO need to add a link in your VOCUS email back to the news release page.

- Find out more about all this stuff on the **News Releases support site** (intranet.epa.gov/newsreleases)

The RICH TEXT Button (link)

- **You can IGNORE the link of "Disable rich text."**

- *What it is:* This is to let you make certain, *limited* adjustments to the existing HTML code. But you can't change styles or add scripts. Web CMS will <u>automatically delete</u> disallowed code you try to add.

Disable rich-text

LET'S TALK ABOUT: Hotlinks

- If you added hotlinks to your news release in Word, you shouldn't have to do anything more. Hotlinks in your Word document should paste successfully into the body field.

- You can manually add hotlinks if you need to – covered next.

- NOTE - **You can't click a link to test it <u>while in edit mode.</u>** You can test it after you save as **draft**, before you publish.

Read more about this: http://www.epa.gov

IF YOU *DO* NEED TO MANUALLY ADD A HOTLINK, HERE'S ONE WAY:

- First COPY the URL of the Web page you want to link to, so you have it ready to paste.

Example: **http://www.epa.gov/mercury/mgmt_options.html**

- In your news release, select (block) the characters to be hotlinked.

- Click the **chain** "link" icon in the edit bar.
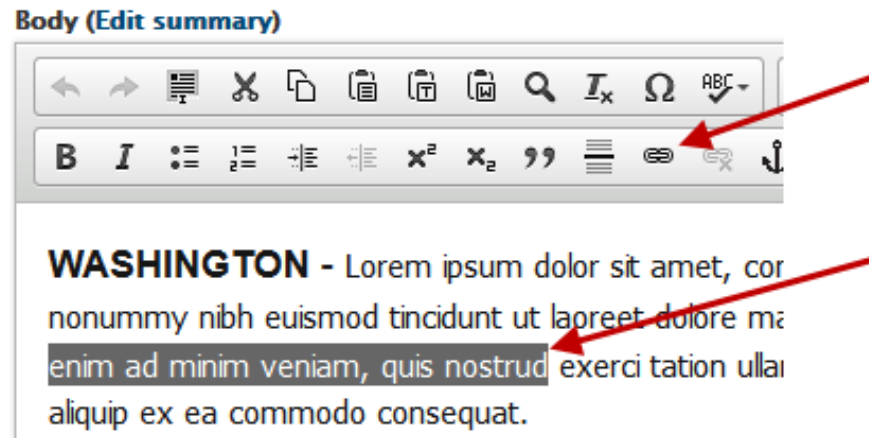
(manually adding a hotlink)

Change the Link Type to **URL.** This is important.
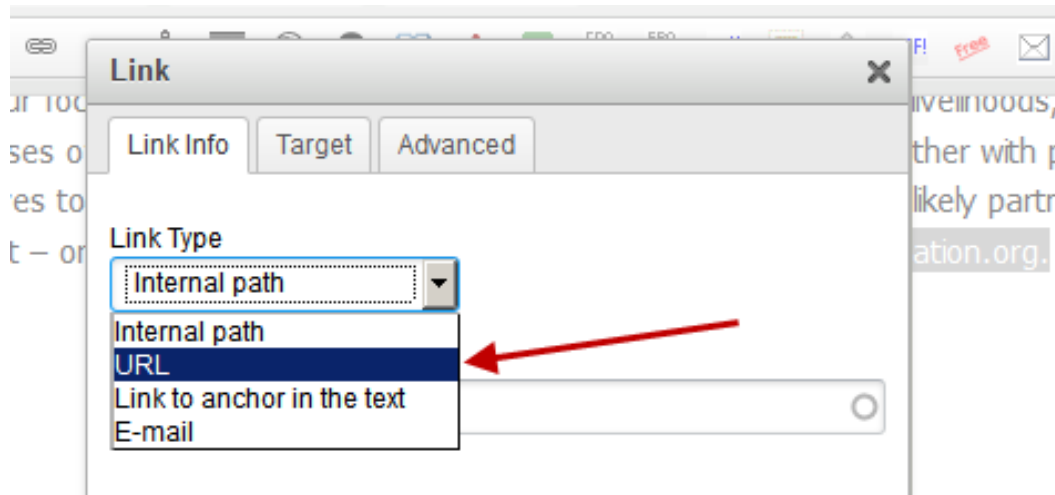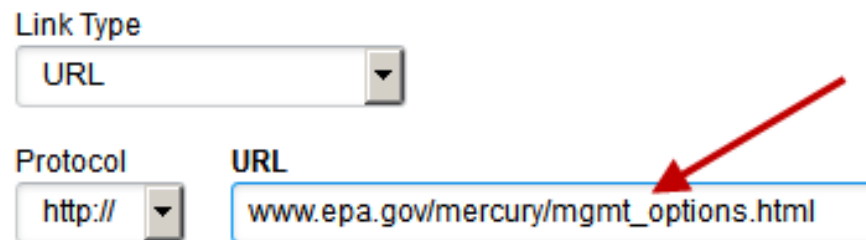
(There are other ways to make links in Web CMS. You can use those, too, if you know how. See also
https://www.epa.gov/drupaltraining/linking-content-drupal-webcms)

(manually adding a hotlink)

PASTE the URL into the URL field.   The **http://** part of your URL might disappear. *It's OK, it's supposed to.*

Do not change "Protocol."

Click the **OK** button (not shown).

Link Type

URL

Protocol   URL

http://   www.epa.gov/mercury/mgmt_options.html

Done.

Delete an existing link (unlink)

- Block the text to unlink.
- Click on the link icon with the "X"
- This will unlink the selected text.
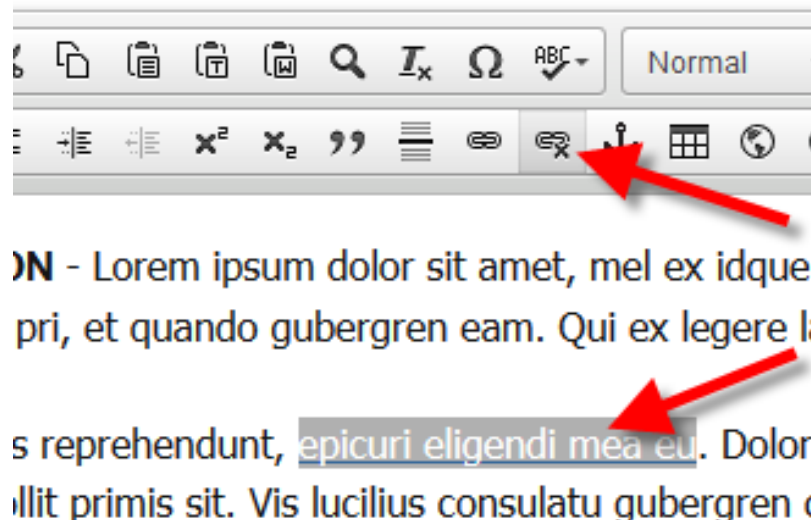
Now back to creating your news release…

Add the Subject
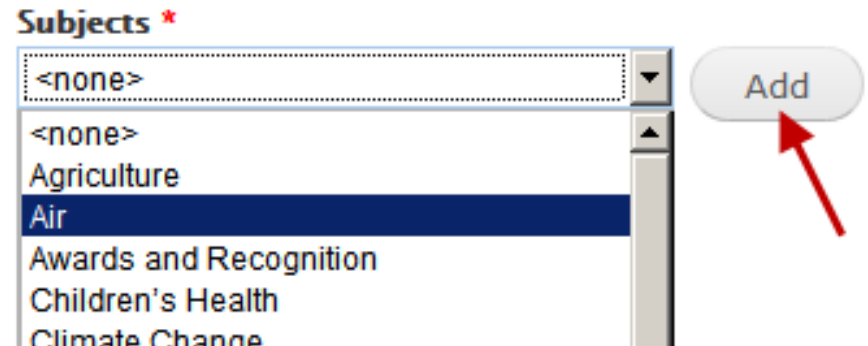
Pull down the **Subjects** picker and stop on the subject you want.

Then click the Add button. *You must click "Add"* *or it won't insert the Subject. This trips up a lot of people.*

To add multiple Subjects: pull the picker down again, select the next subject, and click Add again.

To remove a Subject: click the "Remove" word.

Choose Press Office

Click the Press Office Picker. If you choose Headquarters, a list of the AA-ships will appear to choose from.

Click the Add button. You must click "Add" to insert the Press Office into the list.

Yes, you can add more than one.
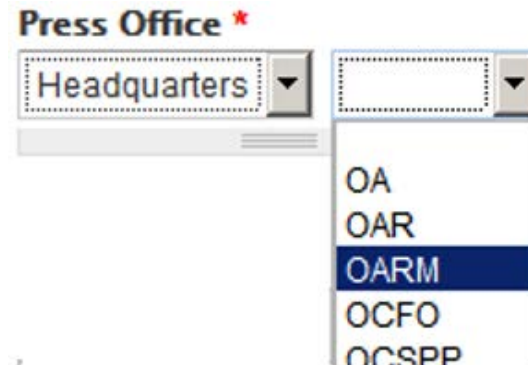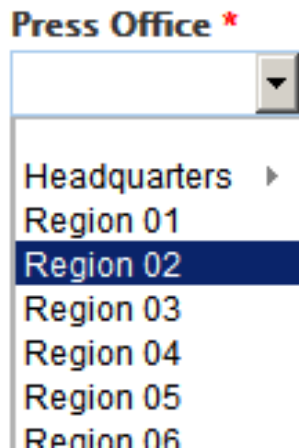
Add the press officer contact info.
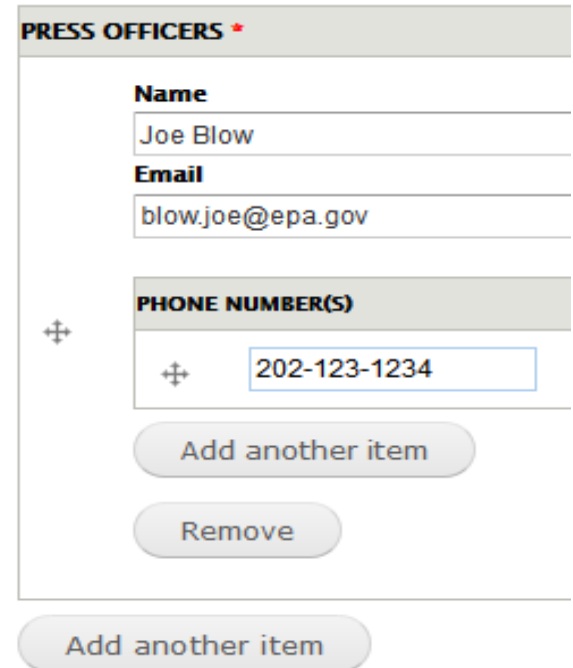
Note – format the phone number how you want it, like (222) 456-7890, 222-456-7890, etc.

*To add another phone number for **THIS** press officer:*
- Click "Add another item" under the first phone.

To add another press officer:
- Click "Add another item" underneath the previous Press Officers box.

(Yes, we've asked them to clarify the buttons to be "Add another phone number" and "Add another press officer.")

Description, Keywords are Automatic

We made it so these two fields are filled in automatically, to help your work go faster.

- **Description** - populates from the news release title.

- **Keywords** - populates from the subject(s) you select.

You have the *option* to edit Description and Keywords. But you don't have to.

How are Description and Keywords used? They are used by the EPA Web, also search engines to identify and sort web pages. They are embedded in the HTML code of the web page and do not appear on the news release page.

☑ Generate automatic description
    Uncheck this to create a custom description below.

Description

EPA News Release: EPA's Energy Star Battle of the Buil
Million, Prevents 250,000 Metric Tons of GHG Emissions/ The a
all 50 states, the District of Columbia, and Puerto Rico

Content limited to 256 characters, remaining: **19**

Do not restate the title; add context to it.

☑ Generate automatic keywords
    Uncheck this to add custom keywords below.

Keywords

Air

A comma-separated list of keywords and phrases about the pa
title/description. Use terms that are part of your page or docum

ABOUT THESE:

- **Type**. Leave this alone. Do not change it.

- **Channel**. Leave "About EPA" checked. <u>Optional:</u> check any of the others depending on the content of your news release.

- **Is Searchable**. Leave this alone. Do not check this.

These settings are required in the Web CMS. They will not (greatly) affect access to your news release.

To add a geographic name.

This is OPTIONAL.

- There's also a "Geographic Location" picker near the bottom of the form.

- Adding state names is a multi-step process but it's easy.

- Begin by clicking the "Geographic Locations" chooser, then pick "United States."

Geographic Locations

<none>   ▼   Add

<none>
International Regions   ▶
United States
Nothing has been selected.
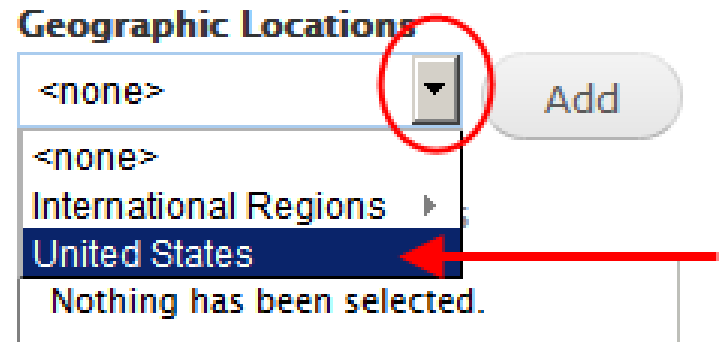
Enter State(s) or other Location

- ***Remember, this is OPTIONAL.***

- Click "States."

- A new chooser with state names will appear. Click the state you want.

- Click <u>Add.</u>

- Repeat for multiple states.

What is Multi-State Region?

Geographic Locations
United States
All selections   Multi-State Regions ▸
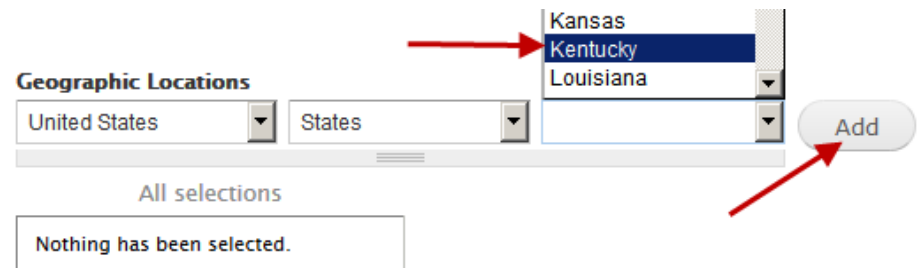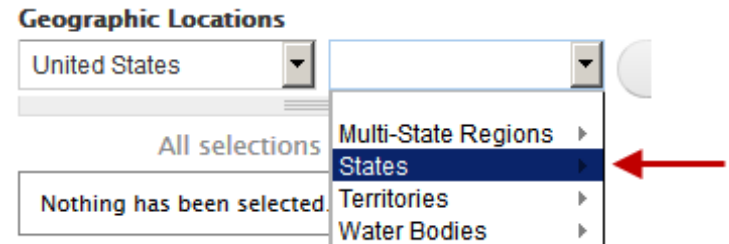
- **Multi-state regions refers to general areas of the US.**
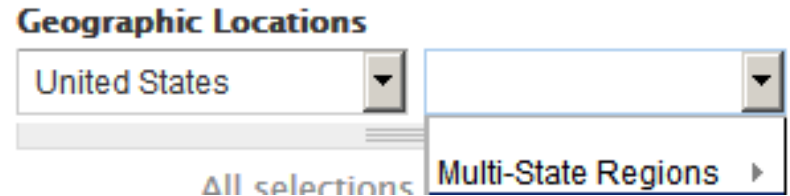
- *It does not mean EPA Region,* even if your region seems to fit the description.

- **WHY USE THIS?** To tag your news release for readers (reporters, mainly) who look for announcements for that section of the USA.

  EXAMPLE: information about a hurricane that hits Louisiana would be of interest to readers in the "SOUTHEAST."
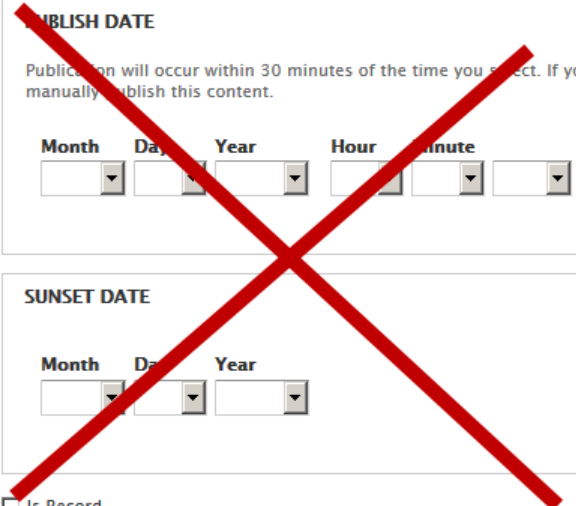
¿What if the news release is not English?

- Non-English news releases require designating language type, and updating the Keywords and Description in a particular way.

- **Contact us if you think you might need a non-English news release.** They are very infrequent. EPA issues a non-English news release on average only twice a month.

- There is a .doc file on intranet.epa.gov/newsreleases covering how to post a foreign-language news release.

IGNORE

- If you happen to see settings that appear to pre-set the publish time.

- **Suggest you ignore this for now, and continue to *manually* publish news releases as needed.**

- Reason is, the publication presets are accurate to only within a half-hour. *Do not depend on this embargoed or precise publishing times.*

Save Your Draft

Click SAVE. This saves as a **draft.** THIS DOES NOT PUBLISH.

Important – you must click Save. If you try to "view" the draft without first saving it as a draft, your entries or changes will probably be lost.

Save

Don't click "View" until after you Save.

VIEW

WAIT. It may take the Web CMS a few moments to respond to your SAVE click.

"Admin Info"

- If you see a WHITE "Admin Info" button at top right, **click it.**
- It should turn orange, and edit controls should appear.
- **Click the little green "Set" or "Save" button.**
- The green button will disappear.
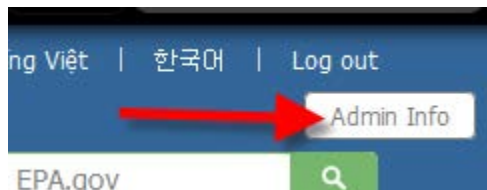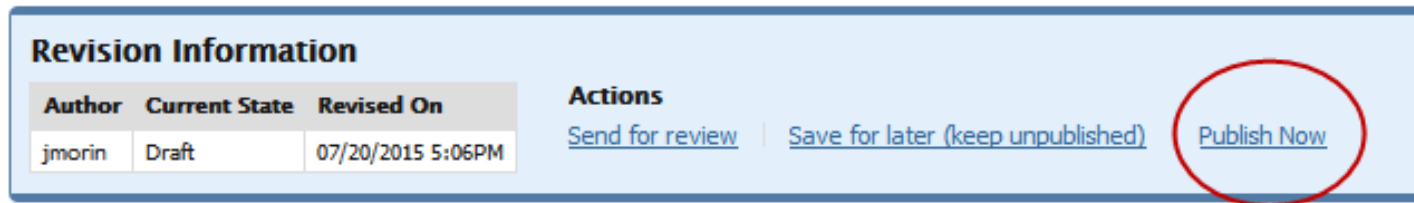
Its purpose is merely to show or hide the editing controls so you can have a clean view of the draft.

If there's no "Admin Info" button *at all* at top right, contact us.

To Publish Your Draft

After saving the draft, you should see a link for "Publish Now" in the blue "Revision" bar at the top of the page.

Revision Information

Author	Current State	Revised On
jmorin	Draft	07/20/2015 5:06PM

Actions
Send for review | Save for later (keep unpublished) | Publish Now

CLICK "Publish Now" – to the publish dialogue.

The publish dialogue page

HERE IS WHERE YOU *PUBLISH NOW.*

- **You must enter a log message.** Suggest either a simple concept like "publishing" or message-to-self, like "publishing for Jane Doe who's out today."

- **You must check the external links box.**

- **You must check the accessible box.**

- **Click "Update state".** _Now_ it will publish.

What is accessible?
What about external links?

- When you publish a news release in Web CMS, you will be asked to certify that the news release meets EPA and legal requirements for ***external links and accessibility.***

- While there are many requirements, the ones likely to affect you <u>are few and won't come up often.</u>

- **Please see the VERY BRIEF training online.** *You should look at it.* **Web CMS will log that you "certified."**

Status Page of the Current Revision.

After it publishes you will get a new page showing the status block of the news release "Current Revision." STATUS should say "Published."

Where is it online?

- Suggested: Send people to http://www.epa.gov/newsroom

- as in "epa dot gov slash newsroom"

- The actual page to browser and search is: https://www.epa.gov/newsreleases/search

IMPORTANT!
DO NOT POST OR GIVE OUT A "WCMS" URL.

Look *closely* at the URL of your news release.

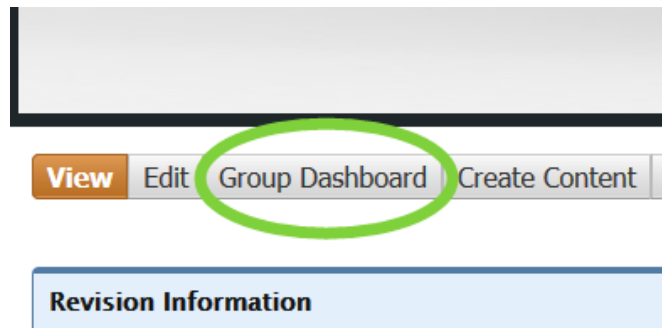https://wcms.epa.gov/newsreleases/ the news release title here

If you see **https://wcms** in the URL, this is the Web CMS version. No one outside of EPA will be able to see it.

Change the wcms to www, then go to the real, published page to be sure it's there.
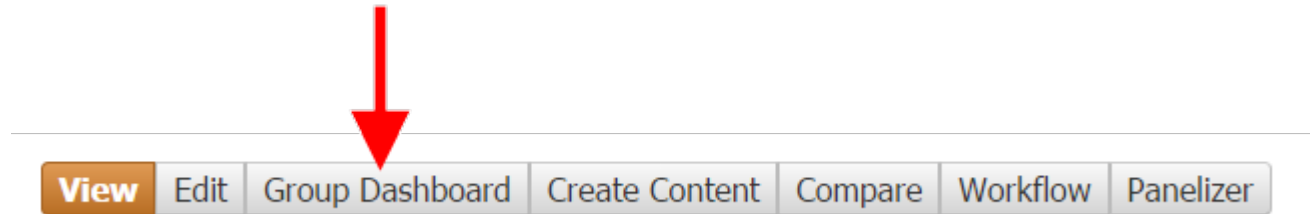
GROUP DASHBORD

To **edit** a published news release

- Use the **Group Dashboard** to find and edit your published news release.

- When you SAVE and PUBLISH your edits, the published one is replaced automatically.
  - The URL and the "release date" do not change.
- Previous revisions remain in the system (offline) but you can go back to them if you need to.

Login > Dashboard > Content

- Log in (if you didn't already) and go to "News Releases"
- Click the Group Dashboard button.

- Click on the **Browse Content** link or tab. This goes to the actual listing of all files.

Find your news release

- The "Content" list shows ALL NEWS RELEASES -- not just published, and not just <u>yours.</u>

- You will need to find your news release **among all the others.**

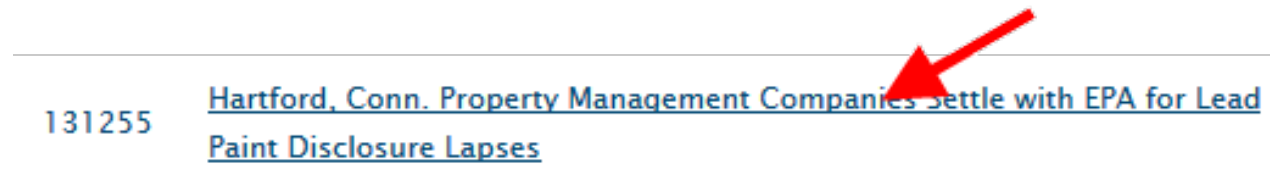- Browse, search, or sort the list…

Various ways to find yours:

- Put your user ID in the "Author" field.
  - This will show you just yours.

- Choose "Published" as the Status type.
  - This will show just the published ones.

- Click "Search."

Author

jdoe45

Enter a comma separated list of user names.

Type

Basic page
Document
Event
News Release
Regulation
Web Area
Webform

Status

Draft
Draft, needs review
Draft, approved
Published
Published, needs review
Published, scheduled for expiration
Unpublished

Search

When you see your news release

- Click the title.

131255   Hartford, Conn. Property Management Companies Settle with EPA for Lead
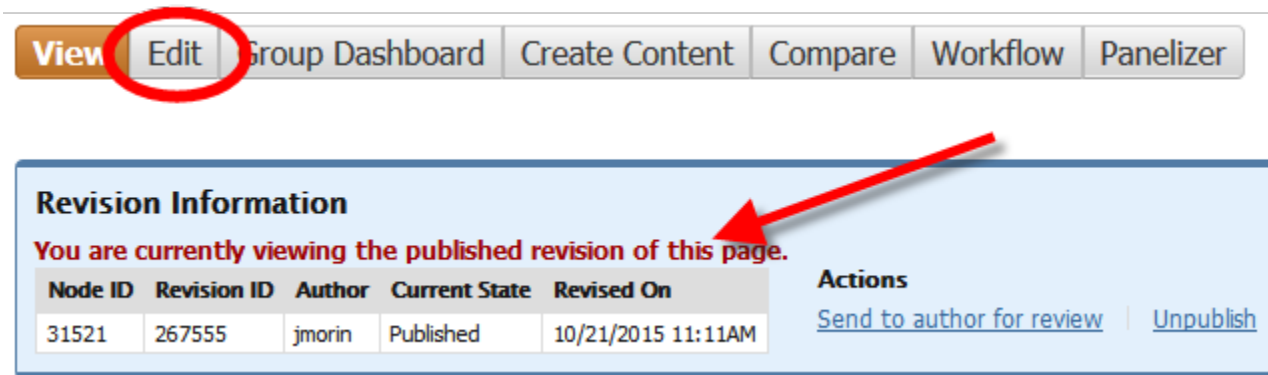   Paint Disclosure Lapses

- This will open the page. You can edit it as a "Revision."

Finishing someone elses?

- You should be able to edit or publish someone else's news release.

- And someone else can edit, publish, or otherwise finish up a news release that you left undone (for whatever reason).

- **<u>CAUTION:</u>** All news releases are in here, so be VERY CAREFUL open the correct news release.

- Web CMS keeps track of which user changes which revisions – in case there's a question.

Now you can edit the "Revision"

- You should now be at
  https://wcms.epa.gov/newsreleases/*whateveryoucalledit*

- You should see the edit controls at the top.

Edit and Publish

News Releases

View | Edit | Compare | Clon

- Click the **Edit** button at the top of the page. Make your changes.

- Click the **SAVE** when you're done making edits.

- *REMEMBER:* "SAVE" DOES NOT PUT YOUR CHANGES ONLINE. You must <u>click to re-publish the revision with your changes.</u>

Publish Now

<u>NOTES</u>

- The URL will not change. People who linked to your news release should not have a broken link.

- It may take a few minutes for a re-published page to appear online. Remember to refresh your browser.

REMEMBER

- **You must also do the PUBLISH step** if you make a change and save the revision.

- Just saving your changed revision will not put your changed version online.

Bookmark these URLs

- Login: https://wcms.epa.gov/user

- Help: https://intranet.epa.gov/newsreleases

WHERE TO GET HELP:

http://intranet.epa.gov/newsreleases

- More training and how-tos, on:
    - Embedding a video
    - Adding photos
    - Adding actualities (sound bites)
    - Cheat sheet – quick reminders

- HELP! If you need assistance.

- Access for new users to the system.

THANKS!