Training Guide for Using City of Seattle Content Management System (CMS) – Contributor

Version 2

Content Management System (CMS) Overview

About the CMS

- The Content Management System (also known as the **CMS**) provides users who don't have extensive web skills with a browser-based tool to create and update web pages, and to share information between websites.

Your Role in the CMS

- Your role is **Web Contributor**. You are allowed to view and edit content on the website.
- Web Contributors use four content types: **Pages** which live in the **Site Tree**, sharable snippets of content called **Components** which live in the **Internal Components** directory, and **Images** and **Documents** (such as PDFs, Word docs, Excel docs) which are stored in the **Asset Manager**.

The CMS Workflow – "the assembly line"

- The Web pages and associated files you work on in the CMS are not immediately published on the live web site, though you can **Preview** them in the CMS.
- Your Team members have different duties in the CMS. All CMS actions are shared by team members through the **Workflow** process which is similar to an assembly line.
- When you complete an action in the CMS, such as editing a web page, you **Advance** your web page in Workflow by sending it for review by your team's Moderator.
- Your Moderator will review and approve content that you have edited, and pass along finalized content for publishing to the live web site.
- At this time, the CityWeb team will be **Web Publisher and Administrator** for your website.
- Once your website is on our CMS Production environment, your team will have two options for publication:

  - A development web server known as QA (for "quality assurance") where web pages are published before they go live, so that you, your web team, and other members of your staff can review the web page exactly as it will look in a browser before it is live.
  - A production web server, where pages are viewable to the whole world.

- It is typical for pages in CMS development to be published to the QA web server, reviewed, edited, and then published to the production web server.

Logging In and Signing Out of the CMS

- **Logging Into the CMS**
  - Navigate to http://cms8.seattle.gov/seattle/
  - Or for training: http://cmstrn.seattle.gov/seattle/
  - Log in with your current City of Seattle Username and Password, or with a CMS system password we provide to you users who are in other domains.
 - If you forget your password, contact the DoIT Help Desk at x61212.

  NOTE: The City of Seattle CMS is NOT available outside of the City firewall. You will not be able to log into it on personal or external work stations outside of the network.

  You can log in remotely using VPN.

- **CMS Tools and Interface**

  - **Overview of CMS Tools and Interface**

    As you log in, you will see the CMS interface, divided into five sections: the Toolbar, the Dashboard, the Accordion Panes, the Edit Pane and the Site Tree.
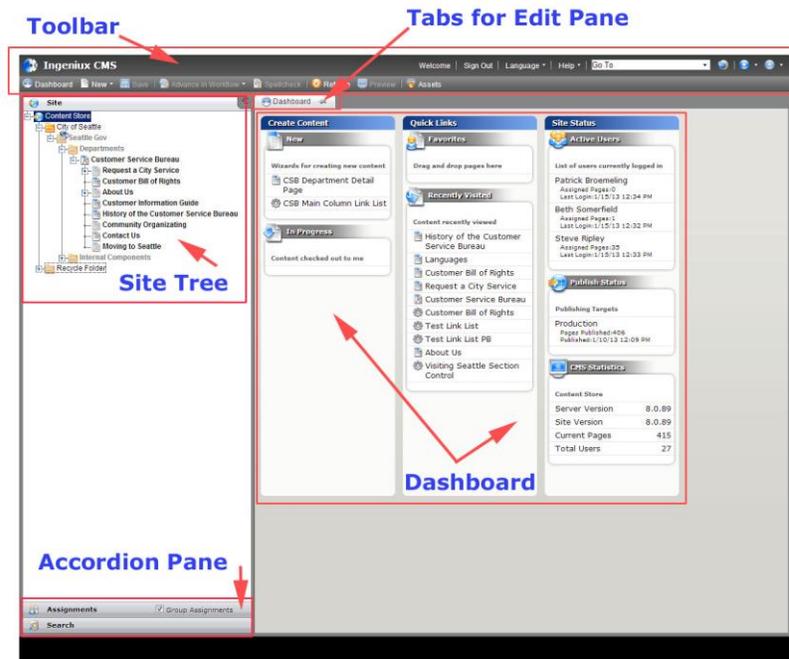
      - **Toolbar**
      - **Dashboard**
      - **Accordion Panes**
      - **Edit Pane**
      - **Site Tree**
      - **Context Menu -** pops up when you right-click on various items in the CMS.

- **CMS Tools and Interface**

  o **Toolbar**
    - In the far upper left of the Toolbar is the CMS logo, a **round blue disk**,

      When the CMS system is "thinking" this blue disk will spin in place. Happens when you Refresh.
    - **Sign-Out**
    - **Help -** If you have questions, contact CityWeb@seattle.gov.
    - **Go to Page search box & Go To button** - Enter Page name, xID, or use dropdown.
    - **Back & Forward buttons**
    - **Dashboard button**
    - **Save**
    - **Advance in Workflow**
    - **Spellcheck**
    - **Refresh**
      NOTE: Always use the Refresh button located in the Toolbar, NOT the refresh on your web browser. The refresh on your web browser will log you out of the CMS.
    - **Preview**
    - **Assets** - Directories for uploading and storing images and documents.
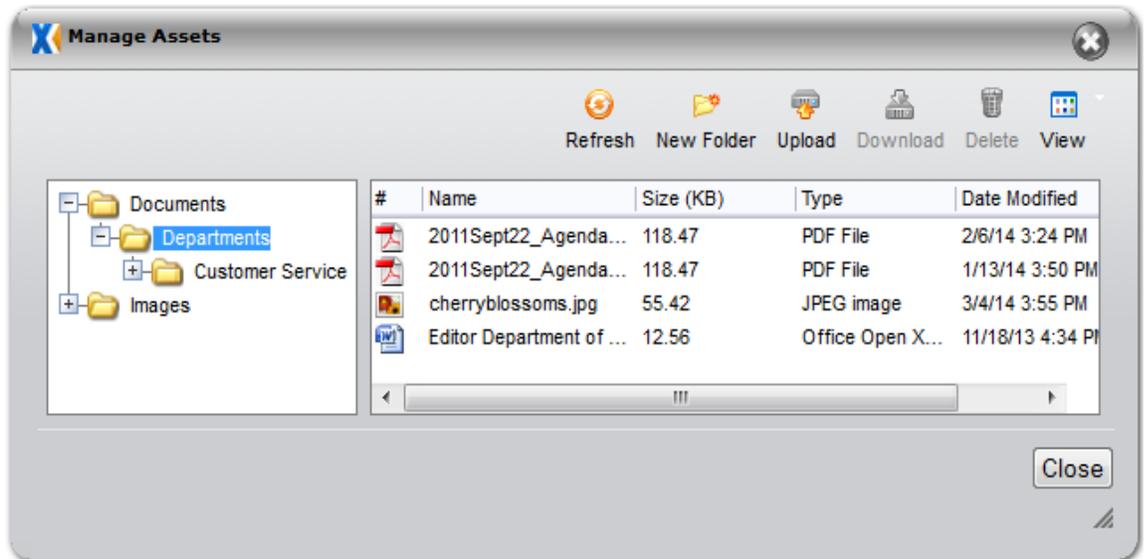
  o **Dashboard**

    - **In Progress** Displays content currently checked out to the user. This is where you will find pages assigned to you in **Workflow**.
    - **Favorites** - Users can drag and drop pages from the Site Tree into the Quick Links area.
    - **Recently Visited**
    - **Active Users**
    - **Publish Status**

- **CMS Statistics**

o **Accordion Pane** - Shows horizontal tabs for Site, Assignments, and Search.

- **Site** - Site Tree for web site.
  Choosing a page displays the selected item in the Edit Pane on the right.

- **Assignments** - list of pages assigned to you in the CMS.
  *NOTE: Choose the **Group Assignments** checkbox, to see Pages assigned to Contributors, occasionally, **you'll need to click the orange Refresh button to see new Group Assignments.***

- **Search** - Check the **Advanced** checkbox to reveal advanced search options. Dropdown menu to filter the search results by Page types.

o **Site Tree -** Site Tree defines the structure and navigation of your web site.
  To open the Site Tree for your department -
  Content Store > Seattle Gov > Departments > Your Department Name

o **Context Menu** - Right-clicking on a particular page in the Site Tree.

  Contributors are able to:

- **Rename**
- **Refresh**
- **Advance** - more detail later … **Advancing a Page through Workflow**.
- **Show History**
- **Send Mail** - Choose User/Group to send to, fill out Subject and text of message.
- **Preview**

*NOTE: **Nodes and xIDs:** Each web page and component in the CMS has its own unique xID. Hovering over a page in the Site Tree will reveal the xID.*

o **Edit Pane** - Contains several different tabs used to edit and manage content within the CMS,

- **Edit Form tab** - Main content editing interface.
  A page icon in the upper left of the Edit Pa ne will be grayed-out if the page is checked in, or assigned to another user. You cannot edit the page if it is checked in or assigned to another user.

- **Page View tab** - Displays the page as it will appear when published to the live web site.
  NOTE Keep the "Show all pages" checkbox checked to view all elements under development in the CMS .

- **Entering an Existing Workflow**

  - You receive an automated email from the CMS, telling you a page has been assigned to you in Workflow.
  - Select the **Assignments tab** in the lower left of the navigation pane.
  - Make sure the **Group Assignments checkbox** is checked.
  - Choose the required Page to edit from the **Assignments tab** list.
  - On the Edit Pane in the upper right-hand side, click the **Assign to Me** button.
  - When editing is complete, **Advance the Page in Workflow**.

- **Beginning a New Workflow**

  - To begin a new **Workflow**, choose the page you want to edit from the **Site Tree**.
  - On the Edit Pane in the upper right-hand side, click the **Assign to Me** button.
  - The page is now ready to be edited.
  - When editing is complete, **Advance the Page in Workflow**.

  o **Accessing Help Text for Element / Element Type**

    Most items/element fields on the Edit Form have a Help icon at their upper right.
    Mouse over the Help icon to see the Help Tip associated with that item/element field.

  o **Completing Page Elements**
    Required elements must have a value before the page can be saved or Advanced in Workflow.

  o Optional **Featured Image** appears above the main content area on your department detail pages.
    Department Home pages may include an image slider.

    Click the **Browse** button to the right of the Image field.
   Choose image file in the **Asset Manager**, then select **OK**.
    Add **Alt Text** as an ADA best practice for images

    NOTE: the images used for the Featured Image field are 720 pixels wide, and may vary between 190 pixels to 225 pixels high.

    Please work with your Site Owner or CityWeb to develop these images in Photoshop to these specifications.

- **Working with the Content Editor**

  The **Content Editor** provides options for formatting, hyperlinks, images and tables in page content.
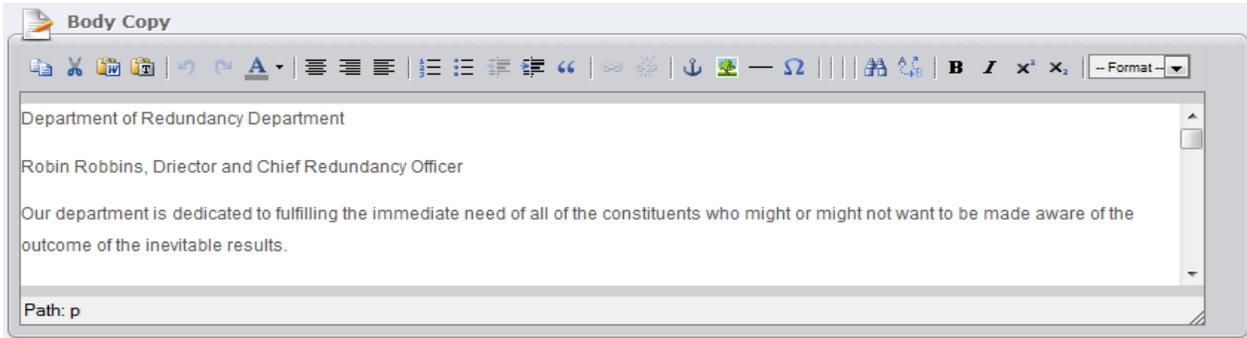
Content Editor box has a resize handle In the far lower right.

Text can be typed directly into the main content area of the Content Editor, dragged and dropped from another source, or copied and pasted from another source.

- **Content Editor Toolbar**
  The Content Editor Toolbar appears along the top. It adapts to the size of your browser window view, so it may present toolbar items in one or two rows.

  - Copies selected text
  - Cuts selected text
  - **NOTE: Keyboard shortcuts work: Ctl-X Cut, Ctl-C Copy, Ctl-V Paste.**
  - Pastes text from a Word document **without** Word-specific formatting. **Note:** If you paste text using a short cut (Ctrl V) or via right click, Paste, the text Word formatting is removed just like the Paste from Word toolbar button.*NOTE: Do NOT copy images from inside Word documents into the Content Editor. Check images in using the Asset Manager and insert them into the Content Editor field using Insert Image.*

  - Pastes text in Plain Text format
  - Undo previous action   Redo previous action
  - Text color. *Please use judiciously*.
  - Center Text   Right Align Text   Left Align Text
  - Unordered List (bullets)   Ordered list (numbers, letters)
  - Indents selected text   Outdents selected text
  - Inserts a section of **block text** to create an indented paragraph section.
  - Highlight the text you want to turn into a link. Choose the **Link** button.

    Opens the **Insert/Edit Link** dialog – 5 types of links can be inserted: Internal, External, Document, Anchor, Email.
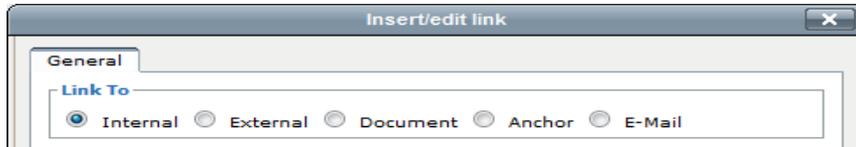
- Internal links are links found from existing pages within the City of Seattle CMS.
- External links are links from web pages outside of the City of Seattle CMS. Note these may be web pages from the City of Seattle web site, as long as they are web pages that have not been placed inside our CMS.
- Document links are links to documents that are stored in the Asset Library. This is for documents in formats such as Word, Excel, Adobe PDFs, Powerpoint.
- Anchor links function like Word bookmarks/hyperlinks, on web pages.
- Email links are self-explanatory eg cityweb@seattle.gov etc.

o   **Unlink**. Removes the link from the selected text. Highlight the hyperlinked text in the Content Editor, then choose the **Unlink** icon in the Content Editor Toolbar.

o   **Insert/edit anchor**. Opens the Insert/Anchor dialog. Enter the name of the anchor. Choose **Insert**.

o   Opens the **Insert/Edit Image** dialog – UPLOAD IMAGE TO ASSET LIBRARY

o   Creates a horizontal rule

o   Launches special character dialog

o   Opens the Insert/Modify Table dialog

NOTE: Do not set a fixed Table Width. Instead, there are several classes you can select in table preferences to get custom designs for your table, including striped, condensed, border and hover. For a preview of the options, visit: http://igxqa8.seattle.gov/demo-home/design-elements/table-design

Note: you cannot use the Right-Click interface to cut/copy/paste text between cells in a Table. However you can select the text you want to cut/copy, and use the Cut/Copy/Paste Selected Text buttons from the Content Editor Toolbar to move or copy the text.

o   Launches Find or Find/Replace dialog

o   Bold selected text

- o *I*   Italic selected text

- o x^2 Superscript selected text

- o x_2 Subscript selected text

- o The **Format** dropdown menu uses **Paragraph, Heading 1, Heading 2, Heading 3 and Heading 4**.

- **Using In-Context Editing**

  The **In-Context Editor** allows you to quickly edit some Text and Body Copy fields on a web page without using the Edit Form fields.

  NOTE: Some fields are not available through the In-Context Editor.

  - o Choose the Page through the Dashboard or Site Tree.
  - o Choose the **Page View** tab in the Edit Pane tabs a nd Choose the **Edit** button in the upper left,
  - o Choosing this "Preview" button closes the In-Context Editor and returns the Page View tab to its regular view, as well as committing any edits you have made with the In-Context Editor to the content.

- **Editing a Component**

  Components can live in a number of places on a Web page.

  - Left Sidebar Components Override – displays below the left navigation
  - Main Column Bottom Components – displays below the main body copy
  - Right Sidebar Components Override – displays on the right column

  To edit a component, determine where it displays on the page, then in the Edit Form view of the page, find the appropriate location. The listed component will have a "Go To" Button on the far right.
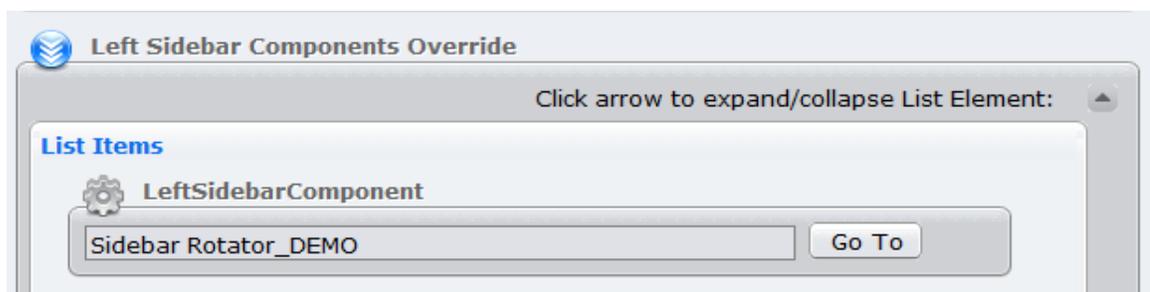
  Click the button to move to the component. You will be relocated to the Internal Components directory in the Site Tree.

  Click the Assign to Me button at the upper right and edit the component. It is not possible to preview a component, however they can be previewed on the page in which they are inserted.

If you edit a Page and an associated Component, BOTH must be Advanced and Published. Publishing just the page will not complete the process.

To return to the page, either navigate back up the Site Tree, or click the Dashboard button and find the page in the In Progress section.

- **Finishing a Page**

  - o **Spellcheck**
  - o **Previewing a Page**
  - o **Saving a Page**
    A Page can be saved at any time. Saving changes does not cause the changes to appear on the published website.

    Make edits, Save the Page, close the CMS and return to it later to finish the edits on the page. This saved draft version of the Page can be later finished and then advanced through Workflow.

  - o **Advance a Page or Component through Workflow**

    Advancing a Page or Component sends it to your Moderator(s).

    - ▪ **To Advance a Page**

      - Click **Advance in Workflow** button in the CMS Toolbar. Choose **Send for Review**

      - The **Advance Page in Workflow dialog box** appears.

      - Select **Send to Review**. Choose **Advance** from dialog box.

      - **Select User** dialog box appears. Choose "All users in the group" from the top field.

      - Enter a **Comment** in the text field that will help identify the changes you made to the page.

      - Choose **OK**.

    - The CMS sends an automated email to the next group in your Workflow process.

    - If a Moderator reviews your edits and sends the web page back to you for more edits, you will receive another email notification containing their comments.