

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

Version 3, 07/28/16

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.
- 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. All CMS processes are shared by team members through **Workflow**, which is similar to an assembly line.
- When you complete an action in the CMS, such as editing or creating a web page, you **Advance** your web page in Workflow by sending it to the Moderators for review, or the Web Publishers to be published.
- If your department doesn't have a designated Web Manager, the CityWeb team will act as **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 Production site: <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.

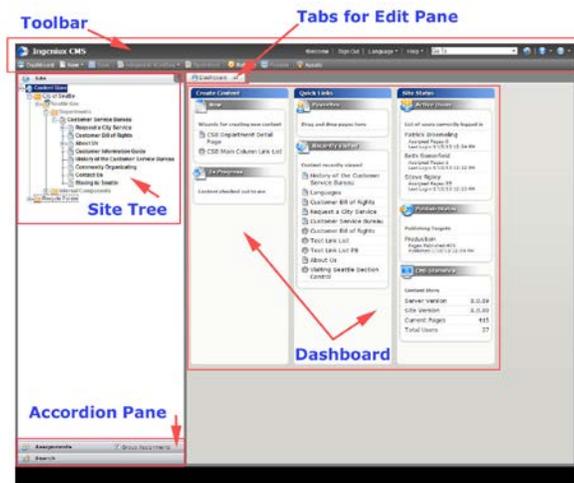
NOTE: The City of Seattle CMS is NOT available outside of the City firewall. You will not be able to log into it on personal or external work stations outside of the network.

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

- **Toolbar**

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



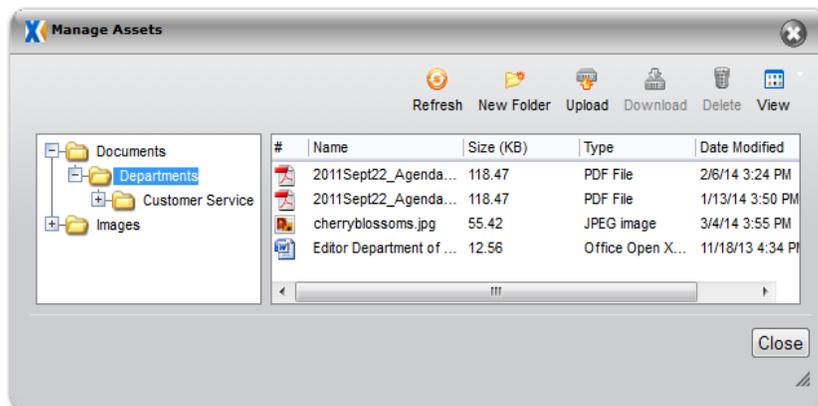
When the CMS system is "thinking" this blue disk will spin in place. Happens when you Refresh.

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- **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.



- **Dashboard**

- **New** – wizard for created new pages and components. (not available to Contributors)
 - **In Progress** Displays content currently checked out to the user.
 - **Favorites** - Users can drag and drop pages from the Site Tree into the Quick Links area.
 - **Recently Visited**

- **Active Users**
 - **Publish Status**
 - **CMS Statistics**
- **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, and sort by date to see new assignments. 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.
 - **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
 - **Context Menu** - Right-clicking on a particular page in the Site Tree.

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Contributors are able to:

- **Advance** - more detail later ... [Advancing a Page through Workflow](#).
- **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.*

- **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 Pane 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.
 - **Categorize** – method to manage site based on categories. Requires separate training.
 - **History** – a list of prior versions of the page.

- Assigning a Page to yourself in [Workflow](#)

- To go to the page:
 - Select the page from the site tree
 - Or, choose the page from your Assignments Tab
 - Or, if you received a CMS notification email, clicking the Edit link will take you to the page
- 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](#).

- **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.

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

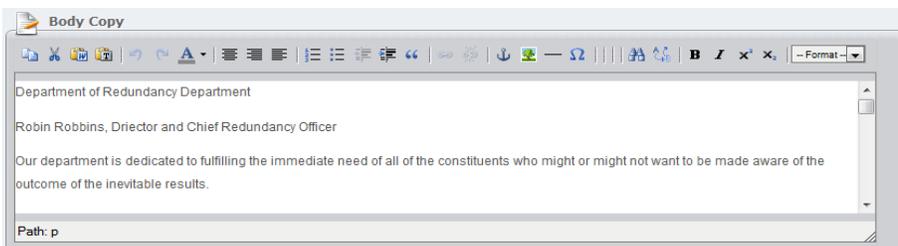
Click the **Browse** button to the right of the Image field. Choose image file in the **Asset Manager**, then select **OK**. Add **Alt Text** as an ADA best practice for images

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.

-  HTML Source Editor – view and edit source code – USE WITH CAUTION!
-  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.

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- 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.

Deleted:

-  **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.
-  **Insert/edit anchor.** Opens the Insert/Anchor dialog. Enter the name of the anchor. Choose **Insert**.
-  Opens the **Insert/Edit Image** dialog – UPLOAD IMAGE TO ASSET LIBRARY
-  Creates a horizontal rule
-  Launches special character dialog
-  Launches Find or Find/Replace dialog
-  **B** Bold selected text
-  *I* Italic selected text
-  ^x Superscript selected text
-  _x Subscript selected text
- 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.*

- Choose the Page through the Dashboard or Site Tree.
- Choose the **Page View** tab in the Edit Pane tabs, and Choose the **Edit** button in the upper left,
- 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 locate the page in the In Progress section.

- **Finishing a Page**

- **Spellcheck**
- **Previewing a Page**
- **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.

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

Contributors are at the beginning of the CMS workflow, and have several options available.

These options are:

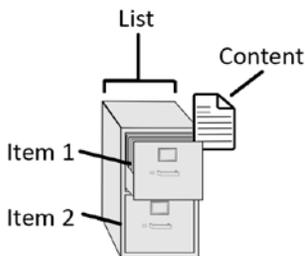
- **Send to Moderators** – If a page is ready to be viewed by the public, choose Send to Moderator, and choose All Users in the group. A Moderator will review the page, and you will receive an email when it is published.
- **Send for Publish to QA** – This option will get the file published to the “Quality Assurance” development server, where it can be reviewed by City staff that may not have CMS access. The address of a page can be found by adding the xID value for a page, plus “.xml” at the end of the QA server address - <http://igxqa8.seattle.gov/x5555.xml>

This preview version will appear just as it would on the production version of the site.

Appendix 1

"Filing Cabinet" Component Structure

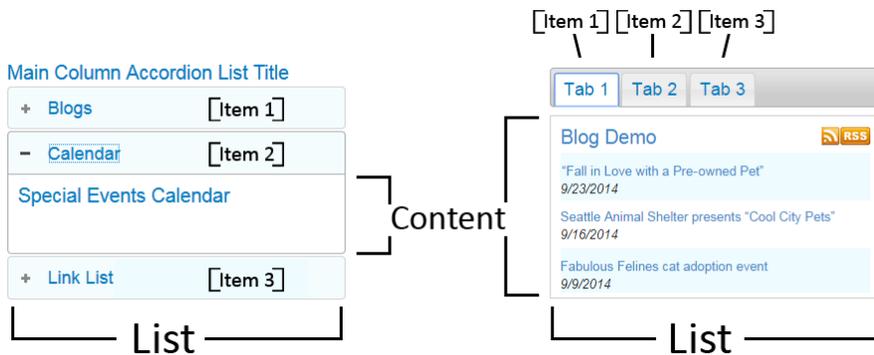
Some components rely on subordinate components in order to work properly. Their structure is similar to a filing cabinet.



The Accordion and Tab components display differently on the page, but share the same behind-the-scenes structure.

- The List component serves as the container
- Several Item components are nested within the List
- The content within an Item is most commonly stored within an XHTML component. Each item can actually support several content components.

The image below illustrates how the List, Items, and related content might display on a page within an Accordion and a Tab.



Appendix 2

Accessibility Best Practices for CMS Content Creators

The City of Seattle is using the [Web Content Accessibility Guidelines 2.0 \(WCAG 2.0\)](#) to build more accessible websites. Compliance for many of these guidelines is built right in to the CMS. However, there are a few areas where thoughtful layout and content writing in your Body Copy and Copy fields are needed to keep your site accessible to all audiences.

These include:

Images

Image descriptions tell screen readers what that image is.

Commented [BP1]: Moved IMAGES to top. This comes up first in training, when we add Feature Image and Alt Text.

Best Practices

- **All images that are conveying information should have an image description.**

The screenshot shows a CMS interface with three tabs: 'General', 'Appearance', and 'Advanced'. The 'General' tab is selected. Under the 'General' section, there are three input fields: 'Image URL' with the value 'apple.jpg', 'Image Description' with the value 'Apple', and 'Title' which is empty. There are also icons for image selection and alt text generation next to the Image URL field. A 'Preview' section is visible at the bottom of the form.

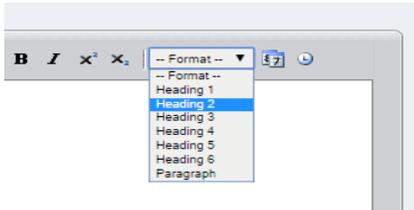
Using headings

Headings help organize content into groups, making them easier to read, scan for key content, and read using screen readers. But, they will only work if they are:

- **Properly coded**
- **In an intuitive order**

Best Practices

- **Select headings from the "--Format--" box**, rather than creating the "look" of a heading using Font sizes, Bold, Colors, or italics.



- **Put your headings in order.**
 - o Heading 1 is the page title – which is already automatically created by CMS, so should not be used.
 - o Heading 2 should be use for your main content categories.
 - o Heading 3 should be sub-sections of Heading 2, etc.

(NOTE: Headings shouldn't be used out-of-order for design purposes, as screen readers (and other readers!) use them to scan and skip through the hierarchy of your site's content.)
- **Want to modify the style of your Headings?**
Contact CityWeb.

Writing link text

Link text should describe the purpose of the link.

Best Practices

- **Make text descriptive.**
(Example: a link to a page about funding opportunities should be called "Funding Opportunities" instead of "more information".)
- **Don't link to the same page using different text.**
(Example: a "Funding Opportunities" link in the navigation should use the same wording if you're also linking from the body of your text.)
- **Don't use the same text to describe links that go to different pages.**
(Example: a "Funding Opportunities" link your navigation should go to the same page as the "Funding Opportunities" link in the body of your text. If they don't, the names need to be more specific.)

Styling

Links that aren't readily apparent, poor color contrast between backgrounds and text, inconsistent layout, and use of outdated HTML style tags can all cause problems.

Best Practices

- **Use the default styles.** If you want to make exceptions, or change your site-wide styles, contact CityWeb to make global style changes.
- **Be consistent across your site.** If you're putting "alert" information in a particular location on some pages, use it side-wide.
- **Don't use HTML to add design elements,** besides Headings and classes from your stylesheet. Older HTML can cause problems. Markup that you learned a few years ago may no longer be in use. Use the default styles and work with CityWeb if you have a custom design idea that you're trying to implement.

Commented [BP2]: Moved to above TABLES. Seems like it belongs with other text-related topics.

Using and Formatting Tables

While tables can be the most effective way to present data, they can be very difficult for screen reading software to interpret, so careful formatting is required.

Best Practices

- Tables should be used for tabular data only, not layout.
- Table headers should be tagged as headers

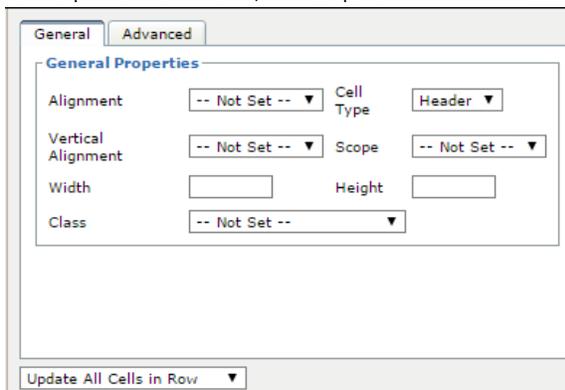
Steps:

1. Right click on the header cell and click "Cell", and "Table Cell Properties":



2. Select "Cell Type: Header"

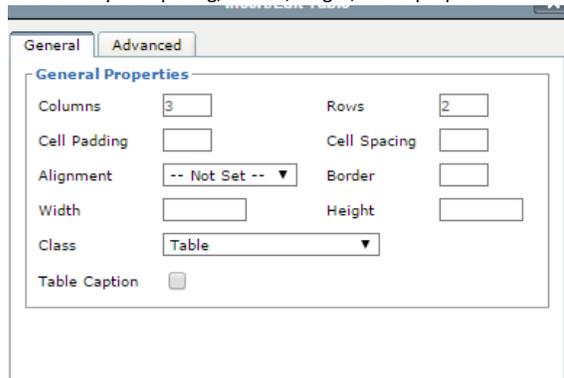
If the top row are all headers, select "Update All Cells in Row"



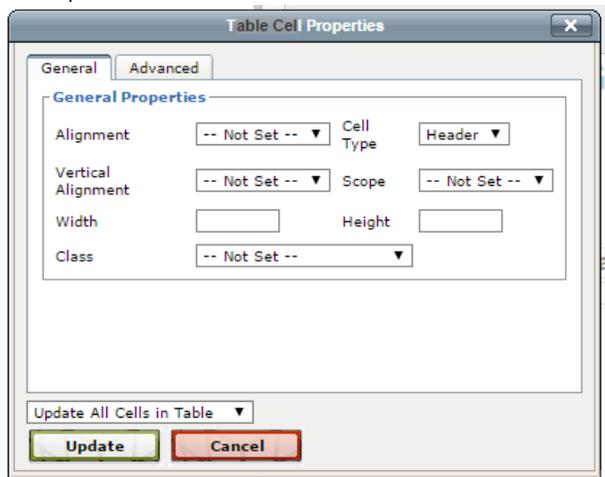
- Tables should not have extraneous tags.

Steps:

1. Right click on the table and select "insert/Edit Table"
2. Remove any cell spacing, border, height, width properties



3. Click "Update"
4. Right Click on the table, click "Cell" and select "Table Cell Properties"
5. Remove any width, height, alignment, vertical alignment properties
6. Select "Update All Cells in table"



7. Click "Update"

Tools and References

- Accessibility Handbook
http://www.qa.seattle.gov/Documents/Departments/Demo/EN_Accessibility_Handbook.pdf
- The Web Content Accessibility Guidelines 2.0 (WCAG 2.0)
<https://www.w3.org/TR/WCAG20/>