

# Content Publishing Guide Active Content

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# Introduction to the Active CMS@UofT

## Overview

The Active Content Manager provides an easy-to-use interface that allows you, to communicate directly to your customers, partners, vendors and colleagues by enabling you to input content to your website directly. If you can surf the web and type an e-mail, you can use the Active CM to help you input, control and publish your information. Your webmaster/site managernistrator has preconfigured the system to allow you to post content in your areas of

responsibility. Follow this step by step guide to access the system, edit, post, and format your content and empower yourself to change the web.

## **CMS Support** [www.cmssupport.utoronto.ca](http://www.cmssupport.utoronto.ca)

The CMS support web site contains all the documentation, examples, tips and alerts. Please bookmark this site and visit often. Email us at [cms.help@utoronto.ca](mailto:cms.help@utoronto.ca) or by telephone at 416.946.5476 Support is available during regular UfoT business hours Our response time is always within 24 hours.

# **Important ACM Concepts**

This section introduces key concepts to understanding how to use the Active Content Manager to create and manage your sites. Review these concepts from time to time; doing so will improve your understanding and ability to work with the Active CM.

## **Admin Center**

The Admin Center is where sites are created, maintained and monitored. Features within the Admin Center are available to users based on their Group settings. Site Managers have full access to the Admin Center.

## **Page Types: how pages look and function**

The published pages on your website appear as they do because of two main components:

- a Page Type that controls the functionality of the page
- a Page Template that controls the formatting of the page

### **Page Types**

Different formatting and functionality will appear in the content area of each page type you select when creating content. For example, when you create a Login page, the page automatically includes a pre-programmed, functional Login box complete with username and password fields. Each Page Type uses a style sheet located in the design package (pagetypes.css) that is fully editable.

### **Templates**

Templates contain layout, design and formatting information that determines how your finished pages look. Templates control both the outer regions of your web pages, defining how the header, footer, navigation panes and other aspects of your site will look, as well as the central content area of each page. By using templates to control site formatting, the Active CM keeps design and content separate. This means that users focus on entering content, while templates control how that content will look. If a change to the site's look and feel is required, the template can simply be updated and the content will automatically conform to the new template design.

### **The Finished Page**

The final published web page is a combination of the template, the page type and the content you enter.

## **System Editors**

There are four different editors used extensively throughout the Active CM. The type of editor available to you depends on the type of information you are editing or the status of the page.

### **Content Editor (Quick edit mode)**

The Content Editor allows you to create and edit page content. The editor consists of a work area and a standard set of toolbar buttons. The Content Editor can be used in quick edit mode, or as part of the Page Editor that allows you to work in full edit mode. Three content editors are available to be assigned to groups, the RAD editor, which is a full featured WYSIWYG editor, the TinyMCE editor, another full featured WYSIWYG, and a plain text editor, which allows those familiar with HTML to work directly with the code.

### **Page Editor (Full edit mode)**

The Page Editor is the full-featured page-editing tool that allows you to not only edit the content of a page or pagelet in the Content Editor window, but also allows you to perform additional page management tasks.

### **Read Only Editor**

The Read Only Editor is used throughout the ACM system when the status of a page is such that it should not be presented in an editable view. When a page is Pending Review and Pending Publication, buttons will be available to perform the actions to move the page through workflow.

### **Question Editor**

The Question Editor is used for creating questions and data collection fields that are used on application forms and surveys. The Question Editor is also used for creating meta data and user profile questions.

### **Image Editor**

The image editor can be used to perform simple editing of digital asset images. Resizing, cropping and flipping/rotating are available in the editor and images can be saved with changes or saved as a new asset, preserving the format of the original. Currently the image editor is only available in the Digital Asset Manager.

## Edit Locking

When Edit Locking is enabled, users will not be able to edit any content or settings of a page while another user is doing so. The Full Edit and Quick Edit Mode buttons are disabled when a user is editing the page. When a page is being edited by one user, all subsequent users will see a message beside the Full edit button stating that the page is “Locked for Editing”. Child pages can still be added from view mode to any parent page locked for editing. Pagelets that reside on a page locked for editing can be edited by another user. A page remains locked for as long as the editing user’s session remains active. Publishing a page, submitting a page to workflow, closing the browser window or navigating away from edit mode will remove the edit lock and allow others to make changes. .

## Parent/Child page Relationship

The parent/child concept is central to understanding how websites are built using the Active CM. A parent page is any page within your website that has pages below it in the website hierarchy. In order to create child pages, you edit a page and add a new page using the Child Pages tab. Once you have added one child page, you can continue to add child pages, creating a cascading effect as shown below.

A website hierarchy should be planned prior to creating the parent/child page structure in the Active CM.

## Dynamic and Static (exported) Sites

### Dynamic Sites

A dynamic site is one where the content and the system used to create the content are all in the same location and are integrated. When content changes are published, they are immediately visible on your site. If this is the site you make available to your public, they too will see the changes immediately. This is different from the static (exported) site that requires the additional step of exporting the site to the static location.

### Static Sites

When a site is exported, the system converts all pages to HTML files located in a folder within the Active CM installation. When users access the site, they are accessing the static HTML files rather than your dynamic site. This in effect unhooks most of the site content from the Active CM and duplicates your site content. The site resulting from the export is referred to as the static site. In order to indicate that you want to export a site, your System Administrator must configure the site export information on the Publication tab of the Site Manager.

## Workflow

Workflow encompasses a number of processes in the Active CM:

1. Workflow Groups are created and applied to Workflow processes that are assigned to pages. This dictates who has rights to edit, monitor and approve a page.
2. Follow-up Tasks which are set on the Workflow tab in full-edit mode. These tasks are: Archive, Inactive, Review or None.
3. “Workflow” is the state a page is in perpetually once created. At any time a page will be in one of any number of workflow statuses.

## Links

There are a number of ways to create links within the Active CM. The method you choose for creating a link depends on the types of links you want to group together and where on your page, or site you wish to place them. *For more information on the types of links available in the ACM, see Appendix A.*

# Before You Start

## Saving Your Work

The most important thing to remember when working with a web-based application like the Active Content Manager is to SAVE your work often. This is important because, for security reasons, you will be logged out of the ACM if there is no activity during the default setting your Administrator has established. Typing in the Content Editor is NOT activity with the system, “activity” is any action that requires you to submit to or request data from the Active CM. SAVE regularly or your work will be lost! **SAVE YOUR WORK!**

# Getting Started

## Logging on to the Active CM

Open a Web browser and go to the login page for your site. Site URL = \_\_\_\_\_ . Your system administrator can provide this information. You should now see the login page. Enter the Username and Password given to you by your System Administrator. The first time you log in you will see your personal information page called My Page. On My Page you can view your personal information and rights, and change your password. You should never change your password in the ACM if you are using LDAP authentication for your user accounts, please check with your administrator. If you don't want to see this page every time you log in to the ACM, uncheck the "Make this my home page" checkbox. Click Save. The next time you log on, you will be directed to your site's Home Page instead of to My Page.

## Changing Your Password

1. On My Page, click the Change Password button.
2. In the Old Password field, enter in your current password.
3. In the New Password field, enter a new password.
4. In the Retype New Password field, enter the password again.
  
5. Click Save.
6. When you are back on My Page, click Save again.
7. Click Logout and log back in again using your new password.

## Changing Your Editor Preference

The editors available to select from are established from your group settings. If you feel you are missing an editor in the drop-down list, please see your System Administrator. If you prefer not to use the WYSIWYG (Telerik r.a.d. or TinyMCE) editor provided with the ACM and work directly with HTML code, you can change your editor by selecting "Plain Text" in the HTML Editor drop-down. The non-WYSIWYG editor includes the following buttons: Insert Digital Asset, Insert Link, Copy to Clipboard, and Paste from Clipboard.

**Insert Digital Asset** – This button provides the ability to directly insert a digital asset into the plain text editor.

**Insert Link** – This button provides the ability to directly insert a page link (internal, external, or anchor) into the plain text editor.

**Copy to Clipboard** – This button provides the ability to copy the text in the plain text editor to the system clipboard.

- o The system will correctly copy digital asset and internal page links to the system clipboard (for the primary purpose of correctly pasting them into Dreamweaver.)
- o If the ability to copy text to the clipboard is not exposed by a browser, the system will provide easy access to the tag as text (for the primary purpose of be manually copying and pasting into Dreamweaver.)

**Paste from Clipboard** – This button provides the ability to paste the text into the plain text editor from the system clipboard.

- o If the ability to paste text from the clipboard is not exposed by a browser, the system will provide a location where the text can be pasted.
- o Pasted text will not be altered by the system when pasted into the plain text editor.

## My Reports

A set of MyPage reports have been provided to help identify pages which need attention by displaying the status of pages that User's are in some way responsible for. Pagelets are included in the reports, exactly as all other pages in the system are. The following Content reports have been provided:

**My Page Rights.** Displays your rights within the ACM system and what groups you obtain those rights from.

**My Personalized Pages.** To identify pages that the user has rights to view. This report will identify the page title, site, hyperlink to view mode, and location line of each page in the report.

**My Draft Pages.** To identify pages for Content Providers, the report includes the page title, site, last modified date time, hyperlink to edit mode, and location line of each page in the report.

**My Pages Pending Approval.** To identify pages for Content Providers, the report includes the page title, site, page status, hyperlink to edit mode, and location line of each page in the report.

**Pages Pending My Approval.** To identify pages for Approvers, the report will identify the page title, site, page status, hyperlink to edit mode, and location line of each page in the report.

**My Pages Pending Translation.** If translation is enabled, to identify pages for Content Providers, the report will identify the page title, site, page status, and location line of each page in the report.

**My Pages Pending Review.** To identify pages for Content Providers, the report includes the page title, site, page status, review date, hyperlink to edit mode, and location line of each page in the report.

**My Pages Scheduled for Archiving.** To identify pages for Content Provider, the report includes the page title, site, page status, archive date, hyperlink to edit mode, and location line of each page in the report.

## The Active CM toolbar

Once you log into the ACM, you will see a toolbar at the top of your web page. If you are ever having trouble accessing a page you know you have rights to work with, check that you can see the ACM toolbar on your page. If it is not there, you are not logged in to the Active CM. At a minimum, you should see the following buttons on your toolbar.

**Thumbtack** the thumbtack allows you to lock or unlock the toolbar from its position at the top of your browser window. Unlocking the toolbar will keep it at the top of your screen even when you scroll down a page. **Greeting** displays a greeting message with either your firstname or your username. **Logout** used to log off of the Active CM. **My Sites** shows all sites to which you have authorized access. **Site Menu** shows site menu for the site you are viewing and provides a means to navigate throughout that site. **My Page** displays My Page. **Help** accesses the online help system and provides a display for support contact information. If you have rights to any of the admin areas, you will see an Admin button to the right of the My Page button. You can click this to go to the admin center or roll over it with your mouse to link to any of the admin options you have access to. Any users with the right to edit pages will also see a button providing them with the ability to create a new child page from the tool bar in view mode and full edit mode.

## Online Help

The Online Help system provides procedures, conceptual information and a glossary of terms. The Help button is located on the far right of the ACM toolbar, and is always available while logged in to the Active CM. There are three methods of navigating the help system:

1. The **Contents** tab: provides a linear view of the help system, allowing you to browse through grouped topic areas, which are then broken into specific subjects.
2. The **Index** tab: provides a keyword entry box that will jump to the topic entered and display all entries for that topic.
3. The **Search** tab: provides a search entry box that will return all entries for the search term

Using the Index is the recommended form of using the Help System, as it is usually easier to locate you specific area of help. Searching often returns a large number of entries that are not relevant to your search. When you have finished using the help system, you can close the browser window. If searching through the online help system did not provide the answer to your question, you can contact the support desk. Support contact information can be found by rolling your mouse over the Help button and selecting About ACM from the dropdown. This window also contains information that may be helpful to the support analyst.

# Page Modes

## View Mode

When not using an ACM editor, pages are in View Mode. View Mode always reflects the published (public) version of a page. If edits are made and only saved, they will not be visible in View Mode.



**Note** If you do not see the edit buttons located on a page, you are either not logged into the ACM or you do not have edit rights for that page.

## Quick Edit Mode

If you have edit rights to a page, you can open the Content Editor by clicking the Quick Edit button. The Content Editor opened in Quick Edit mode does not include any of the Page Editor functionality and is primarily used for making quick text and image changes to your content.

You can also use the Content Editor as part of the Page Editor. To do this, click the Full Edit button. This opens the full-featured Page Editor which includes the Content Editor as well as all of the other page creation and maintenance functions. Quick Edit mode is not available for pagelet editing and is best used with basic page types like General Content. The content editor is available on most page types and is used for creating web content. You can easily format text and insert images, tables, hyperlinks, documents, and much more.

# Full Edit Mode

## Overview

The Page Editor is the full featured page editing tool that incorporates the Content Editor with additional page management features such as the ability to:

- create child pages
- personalize the page (limit access to authorized users)
- set workflow follow-up tasks and publications dates
- add meta data (for web search engines)
- add pagelets (content used repeatedly throughout your site)
- view page history

When you open the Page Editor, a number of sections and tabs are displayed, depending on the type of page you are editing, and the configuration of the site you are working on.

## Page Summary

The Page Summary area provides the tools for naming your page, moving it to a new parent, copying it, making it inactive or viewing the history and restoring a previous version of a page.

### Page Titles

**Title** - this is a required field. The title you enter here is used by various IronPoint tags and will be the default title displayed on the page, in the menu, in the location line and in links to the page. **URL Title** – This is the title that acts as a file name for the page for exported and friendly URL dynamic sites. For example: “about us” will create the file name “about\_us.htm” or “about\_us.html” or some variation of this.

If you leave the URL Title field blank, the Title field is used for the filename. If you are not sure what type of site you have, speak to your System Administrator. Use only alphanumeric characters in the URL Title field. All other characters will be converted to underscores. **HTML Title** - The title you enter here is displayed in the top left hand corner of the Title Bar of a browser window. This is the field that Search Engines look at when indexing your website. Use this field to enter a title that will optimize your site's ranking in the list of search results. If you leave the field blank, the system uses the contents of the Title field.

### Active/Inactive Pages

De-activate a page if it is not necessary to display the page on a site for a period of time, but still have it available in the child page list to make active and display on the site in the future.



**Note** When a page is made inactive, any workflow settings applied to the page are retained. If you do not wish to have “Review Required” emails sent while a page is inactive you must manually change the Follow-Up task setting to “None”.

1. Edit the page to make inactive.
2. In the **Page Summary** section, uncheck the **Active** checkbox.
3. Click **Save** and submit for publication.

### Show History

Each time a page is published, a new version of the page is created and the previous one is moved to the history. Use the page history to track and restore all versions of a page. You can view the history of a page by checking the **Show History** checkbox in the Page Summary. A Page History tab will be displayed to the right of the Pagelets tab. The history displays version numbers; the page name of the version, the last modified (published) date of the version and the user who made the modification. The information displayed on the history tab is the last modified date and user of a version before a new version of the page is created. In most cases, this will be the date and user who published the page (which will display as IronPoint CMS in some cases). The workflow history of a version (including when it was created) is on the Workflow tab of each page version. If you would like to view the workflow notes for all versions of the page, click the Show Workflow Notes link available in full edit mode.

### Restoring Previous Page Versions

1. Click on the **Version number** of the page that you wish to restore. The content of the version to be restored is displayed.
2. Click **Restore**.
3. Click **OK** to confirm the restoration. The page, as well as any previous settings, is restored.
4. Make desired edits to the restored page.
5. Click **Save** and submit for publication.

### Show Workflow Notes

Clicking this link will open a report listing the workflow notes from each version of the page in one view. This printable report opens in a new window.

## Page/Section Move

When you move a parent page, all of the child pages are moved with it.

1. If the page you want to move is published, open it in full edit mode.
2. If the page is not published, edit its parent page, go to the **Child Pages** tab and click on the page you want to move.
3. In the **Page Summary** section, locate the **Move Page** field.
4. Click on <<**Select Page**>>.
5. Select the new parent page and click **OK**.
6. When the page is redisplayed, click **Save** and submit the page for approval.



**Note** If the page you are moving is due for Review, you cannot move it. You must make sure the page is reviewed and then move it. If a page is due for review, it will display this status next to the page's Edit icon.

## Page Copy

Use to copy a single page from one location to another within the same site. The copied page has a Published or Draft status. It retains all content, design and settings information from the original page, but does not retain child pages or the history associated with the original page.

1. Edit the page you wish to copy.
2. In the **Page Summary** section, locate the **Copy Page** field.
3. Click on the <<**Select Page**>>.
4. Select the new parent page and click **OK**.
5. A message is displayed once the page has been successfully copied. The new page will be Published if the copied page was published, otherwise it will have a status of Draft.
6. Repeat the procedure for each additional copy of this page you wish to make.

The pasted page will be placed at the bottom of the list of child pages (if numeric) or in the correct sorted spot (if alphabetic), exactly as if the page had been created through the New drop down. The pasted page will retain the data from the copied page.

The pasted page will retain the Title, URL Title, HTML Title, Teaser, and Active status from the copied page.

The pasted page will retain all custom properties from the copied page, including any HTML content and stored settings.

The pasted page will retain the alphabetic child page ordering setting from the copied page.

The pasted page will retain the workflow associated with the copied page.

The pasted page will retain the personalization settings from the copied page.

The pasted page will retain the metadata information from the copied page.

The pasted page will retain the pagelet zones and pagelet settings from the copied page.

The pasted page will retain the follow up task information from the copied page.

The pasted page will retain all site design information from the copied page, including the template, whether or not the parent's template is being used, whether or not the parent's variable value is being used, the variable value, and whether or not the page is included in the section menu, the children are included in the section menu, the page is included in the child page list, the page is included in the site map, or if the page is included in searches.

The pasted page will **not** retain the child pages from the copied page.

The pasted page will **not** retain the workflow status of the copied page, but will be created as a Published page if the copied page has a published version or as a Draft page if the copied page does not have a published version.

The pasted page will **not** retain the historical information from the copied page.

The pasted page will **not** retain the parent page of the copied page, but will use the page it was pasted onto as the parent page.

The pasted page will **not** retain the translation information from the copied page.

## Page Type



**Note** The feature below must first be enabled in the ACM software. If you would like the ability to change page types through the ACM interface, please contact ACM support for assistance.

If you are a System Administrator you have the ability to change the page type

from the one currently applied to the page you are editing. If you see the (Reassign) link following the current page type, you have right to do this. To change the page type:

1. **Note the warning.** You are about to perform a database operation via the ACM user interface. Ensure there is a current back-up of your site available should you encounter problems.
2. Click the **(Reassign)** link.
3. Select the page type to change the current page to. Click **OK**.
4. When the warning screen appears, click **OK** if you want to continue.
5. As soon as OK is clicked, the pagetype is changed. No publication or submission of the page is required.

6. Edit the page as required.

## Page Owner

If the System Administrator has enabled this feature, Content Providers have the ability to assign page owners to a page. All users assigned to a Page Owner group will display in the drop down list. Combined with a template tag, this functionality provides an easy method to assign and maintain a contact for the information viewed on your site pages by your site visitors.

1. From the **Page Owner** drop down, select the person that should be the page owner. (Their name will be displayed as an email link.)
2. If this person is the page owner of the page's child pages, click **Save and apply to children**.
3. Publish or submit the page for approval.

## Content Tab

This tab is displayed for all page types with the exception of the Category page type. The Content area is where you add and edit page content using the Content Editor; and enter Teaser (Summary) information about the page.

### Content Editor

The Content Editor is an editor window that allows you to work with page content. The editor can be used in quick edit mode, or as part of the Page Editor which allows you to work in a full edit mode. The Content Editor also allows you to view the HTML code for a page. For those users who are comfortable using HTML, a split-screen mode can be enabled, allowing the HTML code to be viewed in addition to the WYSIWYG (**What You See Is What You Get**) editor.

The toolbars across the top of the Content Editor window provide all of the functionality you will need to insert and format content. For a quick summary of

button functions, click on the editor toolbar. Your group rights determine access to editor tools.

### Teaser (Summary) Information

Use the Teaser box to briefly describe the page content. This content is not displayed on the page it is entered on, but is pulled from the page to other pages (e.g. General Content 2) as a method of providing additional information about a page link.

## Child Pages Tab

Pages are added to a site by creating child pages under an existing page.

### Adding a Page

1. Select the parent page for the new page and open the page in **Full Edit** mode.
2. Click on the **Child Pages** tab.
3. Mouse over the **New** button and select a page type from the drop-down menu.
4. Complete the fields in the **Page Summary** section.
5. In the **General Properties** section, enter the optional **Teaser** text (if required).
6. Click **Save**.
7. Enter your page content.
8. Click **Save** and submit for publication. The page will be submitted for approval according to the workflow assigned to the page. You will receive email notifications regarding the status of the page approval.

### Viewing or Editing a Child Page

You can also view or edit an existing Child page from the Child Pages tab. Depending on what your Administrator has configured, you may see a full list of all child pages currently under the parent or you may see a link to view all of the child pages (as of version 8.9). You can click the link to view the full list of child pages or if you know the name of a child page you are looking for, you can use the Search function to find that page.

# Workflow Tab

## Publish Date Scheduling

A page can be scheduled to be published at a future date and time.

1. Go to the **Workflow** tab.
2. Next to the **Publish Date** field, click  to select a date for publication.
3. In the drop-down boxes to the right of the calendar icon, **select the time** at which you want the page published.



**Note** If the site is statically published, future publication times must be set in relation to the scheduled export of the site. If the site is scheduled to export at 3:00am every day, do not set the future publish time for 4:00am, or it will not be exported to the static site until the next day.

4. Click **Save** and submit the page for approval.

## Follow-up Task Scheduling



**Note** If follow-up tasks have been disabled as a system, site or page type setting, you will see “Follow-up tasks are disabled for this page” instead of the options below.

If a page is set to be reviewed, it will by default use a setting established by your Administrator as the follow-up task date. You may also schedule a follow-up task for a page to ensure it gets reviewed, made inactive, or archived on a specific date.

1. Go to the **Workflow** tab.
2. Next to the **Follow-Up Task** field a date will be set by default using the settings as determined by your Administrator. Click  to change the date for the follow-up task.
3. In the drop-down boxes to the right of the calendar icon, **select the time** for the scheduled follow-up task.
4. Select **Review, Inactive, Archive** or **None** (if available).



**Note** As of ACM version 8.9, you can now apply the selected follow-up task to all child pages. This will apply the follow-up task only, not the date of the task as that is unique to each page.

5. Click **Save** and submit the page for approval.

When a scheduled follow-up task comes due, a notification email is sent to the Providers and Monitors of the page.

## Personalization Tab

When a page is Personalized, access is restricted to a User Group. This is useful when you have content that only certain individuals should have access to. Once personalization is implemented, users require an account to access those pages on

your site. For full instructions on using Personalization see the *System Administrator Guide*.



**Note** Personalization will only work in a dynamic environment. You may add a login page within your static site for visitors to access personalized content, but the personalized pages will remain within your dynamic URL.

1. Go to the **Personalization** tab. If the tab is not displayed your site has not been set to use Personalization, contact your System Administrator.
2. Check the **Personalize Content** checkbox.
3. If you want to use the same personalization settings as this page's parent page, check the **Use Parent Members** checkbox.

4. If you want to use different personalization settings than the parent page, uncheck the **Use Parent Members** checkbox and click the Viewer(s) link to select the group.
5. Click **Save**.

## Meta Data Tab

Your System Administrator sets up the Meta Data questions that will be used on your website. If there are no questions on the Meta Data tab, it means your Administrator has not created any. Meta data is not displayed on a web page; it is only inserted into the page code.

1. Go to the **Meta Data** tab.
2. Answer the questions on the Meta Data tab.
3. Click **Save** and submit for publication.

## Pagelets Tab

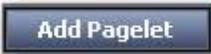


**Note** To create pagelets you must have rights to create and edit Syndicated Content. See the *System Administrator Guide* for more information. As of ACM version 8.9, you no longer need rights to the Syndication Manager in order to view the pagelets tab and add pagelets to a page. This is a separate permission.

Pagelets are single instances of reusable content. If a change is required to the information contained in the pagelet, it can be changed once and then all instances of that content are automatically updated so that all pages and sites reflect the change. Pagelets are inserted on a page using the Pagelets tab in the Page Editor but they can only be added if you have appropriate user rights and if the page you want to add them to is setup for adding pagelets.

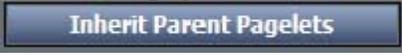
1. Go to the **Pagelets** tab.
2. Click

This adds a zone area to insert the pagelet into. Templates are formatted to place pagelets in specific locations on the page called zones. For example,



Add Pagelet

zone 1 might be located in the top right corner and zone 2 in the bottom right corner of the page.

Additionally, you can click  This will force the current page to inherit all of the zones and pagelets in those zones from its parent page.

3. Click on <<**None**>> to select a pagelet to insert.
4. Select a pagelet from the **Select Pagelet** dialog and click **Save**.
5. The zone will now display the assigned pagelet name.
6. For pagelets that render results in separate pages (Search, QuickPoll, Multi-Poll) you will have the additional option to set the pagelet to **Use Page Template**. Selecting this option will render the pagelet results page using the same template that is currently selected for the page on which the pagelet resides, instead of the default pagelet template.



**Note** This feature is **NOT** currently supported on statically published sites.

7. Click the **Save and Force Children** link to apply the same pagelet to the child pages of the page you are working on.
8. Check the **Use Parent** box to apply the pagelet from the same zone on the parent page of the page you are working on.

9. Click **Save** and submit for publication.

## Design Tab

If your user group has been given permission by the system administrator, you will see a new design tab in edit mode of your pages. The design tab allows provides you access to the settings found in the Site Design Manager for each page. These settings include the template currently assigned to the page, whether the page should be included in the section menu and many others (see the *ACM Design Guide* for full details).

## Email Tab

The email tab in Edit Mode will only appear for those pages that have email functionality associated with them. Prior to version 8.9, all emails were stored in the Global System Variables where only system administrators could access them. Now for pages such as the Calendar, content providers can edit the content of the emails that are sent out by the page.



**Note** These settings are still global so changes made to email text on one Calendar page will also appear on other Calendar pages.

## Translation Tab

The settings on the Translation tab, in conjunction with the configuration set by the System Administrator, provide the means for controlling which pages require translation and which pages on your primary site are linked to which pages on your secondary site. Once your primary and secondary language sites are up and running, most of what occurs on the Translation tab, occurs automatically. For example: when translation is required at the site level and the Home pages of the primary and secondary sites have been associated, the creation of mirror pages on the secondary language site is automatic. Each time a new child page is created on the primary site, the same page is also automatically created on the secondary site with a status of Draft.

### Configuring Pages for Translation

When a site is configured as part of a translation set, the Translation tab appears in the Page Editor. How the settings on this tab affect the translation process depends on how your System Administrator has configured the sites in the translation set:

#### **Primary Site Configured to Require Translation**

Your System Administrator can set your primary site to Require Translation. This means that once a page on the primary site is edited, the version of the page on the secondary site must be edited and published before it will be published on the primary site. The workflow consists of creating/editing a page on the primary site, translating and publishing it on the secondary site, at which point the original page on the primary site publishes automatically.

#### **Primary Site not Configured to Require Translation**

If your System Administrator has not set the primary site to Require Translation, you may be able to create content on the primary site and publish it without having to ensure that the translation is completed and published first. Even when the primary site does not require translation throughout, the site administrator can set a Requires Translation setting for specific pages or sections of a site. Speak to your System Administrator for more information on how they have configured the site.



**Note** When you Emergency Publish in a multi-language environment, you completely bypass the translation process and the system rules that enforce translation.

If content is emergency published on one of the sites within your translation set, you must be sure to review the changes that were made to determine if the content must also be updated later on the other sites within the translation set.

### Repairing Broken Page Links

There are times when the system will advise you that the page you are working on is no longer linked or associated with the correct version of the translated page. When this happens, you must update the link manually and review the content of both pages to ensure they are properly synchronized in terms of their content.

1. With the page open in the Page Editor, go to the **Translation** tab.
2. In the **This page is a translation of another page** section, click on the link beside the **Change Page** field.
3. From the **Choose Page** dialog, select the page to re-associate the current page with.
4. Click **OK**.
5. Click **Save**.

Be sure to review both the primary and secondary language pages to ensure the content is current and correct on both

sites.

## How to View Content to Translate

The Translation tab of the translated site displays information about the originating page. You will see what page is being translated, the page language, and the page status. When the page being translated has been updated, approved, and is pending translation you can view the updated page prior to its publication.

1. With the page open in the Page Editor, go to the **Translation** tab.
2. In the **Page Being Translated** section, click on the page title link which appears before the version number.
3. The version of the page that is pending publication will open in a new window. You can keep this window open while editing the translated page.
4. Close the window when your edits are complete.
5. **Publish** or **Submit** your page for approval.

# Preview

## Pages

Previewing the output of a page prior to publication is performed by clicking the **Preview** button in full edit mode of by selecting the preview option from the dropdown in quick edit mode. The Preview function will render the page in View Mode in a separate browser window so you can see what the output will look like once the page is published. Click the **Close Preview** button at the top of the new window to close the preview of the page.

## Pagelets

Pagelets do not have their own view mode as pages do. So prior to ACM version 8.9, there was no way to preview the output of a Pagelet before publishing the pagelet. In ACM version 8.9 and up, you can now preview pagelets in two ways:

### New Pagelet

When you create a new pagelet, the only way to preview it is within a default pagelet viewer. When you select the “Preview” button in edit mode of the pagelet, select the **Clear Selection** checkbox to view the pagelet in the default viewer.

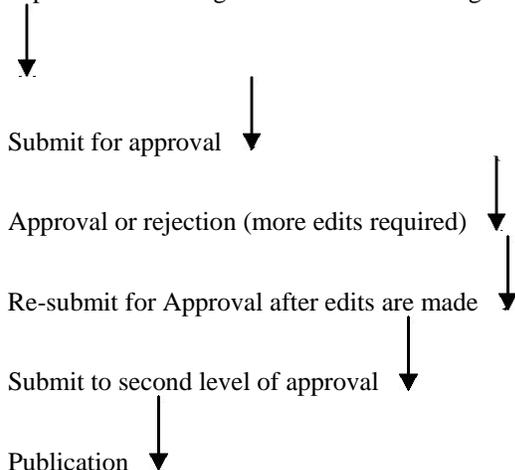
### Existing Pagelet

If you have an existing pagelet that is already assigned to page, you can preview any changes you made to the pagelet within the context of the pagelet zone on any page to which the pagelet has been added. When you select the “Preview” button in edit mode of the pagelet, select the Site from the dropdown, then choose a page the pagelet is currently assigned to. The preview window will display the pagelet in the context of the pagelet zone to which it is currently assigned on the page you selected. If the pagelet is not assigned to the page you selected, it will not be displayed.

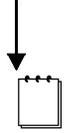
# Content Approval

## Submit Content for Approval

When page edits are complete, a page is submitted for approval. Click the **Submit for Approval** button at the top of the Page Editor and enter a workflow note (if enabled and required). When a page is submitted for approval, it enters workflow and the approver(s) is notified that action is required. The steps a page goes through before being published depends on the assigned workflow. The diagram below outlines a sample workflow process: Create content



Monitor notified of changed content Scheduled Follow Up As a page proceeds through workflow, different groups are notified. For example, monitor groups receive notification that a page has changed and no action is required on their part. Approver groups will receive the same notification and will be responsible for approving or rejecting the content.



**Note** If your site uses **Workflow Notes**, use them to document information about content edits. If the page is rejected, the approver will enter notes indicating why. Once the page is published, a new page version is created and all previous workflow notes are moved to the page history with the previous version. Workflow notes are not written into Publish emails.

## Approve or Reject Page

When a page is submitted for approval, all content providers in the workflow for the page receive an approval required email. When an approver opens a page to approve it, the page will open in the read only editor. Depending on the rights of the user and the workflow assigned to the page they will see a selection of action buttons to move the page through workflow. These buttons typically allow an approver to vote to approve the page, vote to reject the page, preview the page, and to edit the page.

### Vote Approve

If there is one approver and one level of approval, voting approve will allow a page to be published.

If there is one approver and multiple levels of approval, voting approve will move the page to the next level of approval until the last approval level is reached, at which time when approved will allow a page to be published.

If there are multiple approvers and one level of approval, voting approve will count as a vote towards a page being published.

If there are multiple approvers and multiple levels of approval, voting approve will count as a vote towards moving the page to the next level of approval until the last approval level is reached, at which time when all approval requirements are met, will allow a page to be published.

### Vote Reject

If there is one approver and one level of approval, voting reject will not publish the page and will notify the content provider.

If there is one approver and multiple levels of approval, voting reject at one level will prevent the page from moving to the next level of approval and return the content back to the provider for revision.

If there are multiple approvers and one level of approval, one approver voting reject will force the page back to the content provider for revision.

If there are multiple approvers and multiple levels of approval, a reject vote by any user on any approval level will return the page back to the content provider for revision.

# Page Activation and Deletion

To temporarily remove a page from a site and have it available to future use, the page is made inactive. To permanently remove pages (delete them) from a site, the pages must be archived.

## Active/Inactive Pages

Pages are made Active or Inactive using a checkbox either on a page itself, or on the child page list of the parent page.

1. Edit the parent page of the page to make Active.
2. Go to the **Child Pages** tab and locate the page in the of child page list.
3. Check the **Active** checkbox to activate the page.
4. Click **Save** and submit the parent page for publication.

OR

1. Edit the page of the page to make inactive.
2. Uncheck the **Active** checkbox to make the page inactivate.
3. Click **Save** and submit the page for publication.

## Archiving/Deleting Pages

Archiving a page removes the page from your site. Once the page has been archived your Administrator can only access it using the Archive Manager tool.

1. Edit the parent page of the page to archive.
2. Go to the **Child Pages** tab and locate the page in the list.
3. Check the **Archive** checkbox.
4. Click **Save** and submit the parent page for publication.

OR Set a page to be archived at a future date using the Workflow tab in Full Edit mode.



**Note** As of version 8.9, archiving a page will also automatically archive all child pages. This was done to maintain integrity between pages. In previous versions of ACM, archiving a page orphaned the child pages, providing no automatic navigation to those pages. When the parent page was deleted from the archive manager, the child pages would be deleted from the site. Maintaining the integrity of the parent/child relationship will remove the occurrence of surprise page deletions.

# Locating Pages

There are a number of ways to locate a page on your site:

## Site Menu

The Site Menu is located on the toolbar. If all sub-sections of the site are not visible, the Administrator has limited the number of levels that are displayed.

## Child Pages Find Feature

1. Go to the **Child Pages** tab of the parent page.
2. In the **Find Text** box, enter a portion of the **Page Title** of the page you are looking for.
3. Click **Find All**.

## Site Search

Use the Search feature of your web site. Once you locate the page, you can edit the page.

# Child Page Links

Child page links provide navigation throughout a site from a parent page or menu to the child pages. The system can be configured so that child links appear in different places, facilitating different types of navigation.

## Section Menu Child Links

When a child page is created, the new page is added to the section or navigation menu. If a page is not added to your site navigation as expected, your Administrator will need to change the Site Design settings for the section or page.

## Content Area Child Links

If your site is designed to automatically list child page links on some pages, the Administrator can change the Site Design settings to have each page display or not display within the content area of its parent page child list. Child page links can be reordered using the following steps:

## Site Menu Links

The Administrator defines the number of levels of the web site hierarchy that are to be included in the Site Menu. For each level included in the Site Menu, the child pages created at that level will be displayed.

## Reordering Child Pages

Child pages are by default ordered numerically or alphabetically, they can also be manually reordered while in numeric order.

1. Edit the parent page that contains the child links you wish to reorder.
2. Go to the **Child Pages** tab.
3. At the top of the list of child pages, there is a **Sort Order** option. Select **Alphabetic** to organize the pages alphabetically. Each time you add a child page, it will be inserted alphabetically in the new order.



**Note** When pages are ordered alphabetically the order cannot be changed on an individual basis. Alphabetized links are displayed with 25 links per page. So rather than scrolling down a long list of child links, only 25 per page will be displayed and users will have to page through them to locate the desired link.

4. Select **Numeric** to order the child pages in the order they were created, or to manually move pages up or down in the list. To move pages up or down,

click on the **Up and Down Arrows**. You can also move pages by clicking on the number beside the page and typing in a new number.

5. Click **Save** and submit page for publication.



**Note** When using the search function on the child page tab in all ACM versions following 8.9, you will be able to easily order the search results to help you find the page you are looking for. This reordering will not affect the way the child pages are displayed in View Mode.

## Quick Edit Mode

Quick Edit mode consists of only the Content Editor. In Quick Edit mode only content editing and standard actions (preview, save, submit for approval, etc.) can be done.



**Note** You may not have access to all editor tools. This is determined by Group rights and as established by your Administrator.

A drop-down menu displays the actions available to a page, these include:

**Preview** allows a page to be previewed before it is published to check content and formatting.

**Save** saves a page in draft form.

**Cancel** cancels all edits and closes the editor.

**Publish** publishes a page on the next publishing run or at a predetermined time.

**Vote Approve** allows content approvers to approve the page.

**Vote Reject** allows content approvers to reject the page. **Edit** allows content approvers to edit the content before resubmitting for approval. Note that this button must be pressed before editing content or the changes will be lost. **Re-Submit** (for approval) Available to content approvers after they have edited a page of content. Quick Edit mode opens a content editor window without going into the full Page Editor mode. An editor window appears in the content area of the page.

1. Locate the page you wish to edit.
2. Click the button.



**Note** If the Quick Edit icon does not appear, you do not have the rights to edit this page. Please contact your Administrator for assistance.

3. Make edits in the content editor.

4. Click to display the **Action menu** and select **Save**.

5. Click to close the Quick Edit window and return to View mode, or click on the Action menu again and submit the page for approval.

## Content Editor

### Help

The Content Editor has a Help button that provides a table describing each of the editor tool functions. Click to view the Content Editor Help window.

### Text Editing Features

The following settings are for the Telerik r.a.d. editor in ACM. See Appendix B for explanation of the settings provided by the TinyMCE Editor.

#### Align Paragraphs

There are four different ways you can align paragraphs. **Align Left**

Select the text you want to align at the left.  
On the toolbar, click the Align Left button.

### **Align Center**

Select the text you want to center.  
On the toolbar, click the Align Center button.

### **Align Right**

Select the text you want to align at the right.  
On the toolbar click the Align Right button.

### **Justify**

Select the text you want to fully justify.  
On the toolbar click the Justify button.

## **Apply CSS Classes**

Applies a style from the drop-down list to a selected area of content. Styles in this drop-down are pre-defined formats added by the Administrator.

1. Select the content on your page to apply styles to.
2. Click on the **Apply CSS Class** drop-down and select the desired format option.

## **Apply Background Color to Text**

Applies a background color to a selected text area.

1. Select the text to highlight.
2. Click the **Background Color** button and select a color.
3. To remove highlighting, select the text and set the background color to be the same as the background color of the rest of the page.

## **Bold Text**

Bolds text either as you type or after you have typed it.

1. Select the text to bold.
2. On the toolbar, click the **Bold** button.
3. To remove bolding, select the text and click the **Bold** button again.

## **Copy and Paste**

and Copies a section of text or graphics from one location and pastes to another.

1. Select the item you want to copy.
2. On the toolbar, click the **Copy** button.
3. Position the cursor on the location to copy to.
4. Click the **Paste** button.



**Note** When you paste text into the editor from a Microsoft Word document, you will be prompted to remove the Microsoft Word formatting. Removing formatting is necessary to make your page W3C compliant and to allow the site styles to be applied.

## **Cut and Paste**

and Cuts a section of text or graphics from one location to another. To delete content only the cut action is required.

1. Select the item you want to cut and click the **Cut** button.
2. To move the content to another location, place the cursor in the new location and click the **Paste** button.

## **Font Name and Size**

Changes the style and size of selected text.

1. Select the text you want to change.
2. On the toolbar, click on the **Font Name** drop-down and select a new font.
3. Click on the Size drop-down to select the font size.

## **Font Color**

Changes the color of selected text.

1. Select the text you want to change.
2. Click the **Foreground Color** button and select a color.

## Indent Paragraph

Moves the paragraph to the right, away from the left-hand margin of the page (also used to create a sub-list).

1. Select the paragraph you want to indent.
2. On the toolbar, click the **Indent** button.
3. The content editor increases the paragraph indent by one tab stop per click of the Indent button.

## Italic Text

Changes the style of selected text so that rather than being straight up and down, will slant to the right.

1. Select the paragraph you want to italicize.
2. On the toolbar, click the **Italics** button.
3. To remove Italics, select the text and click the **Italics** button again.

## Lists Unordered (bulleted)

Formats selected text into a bulleted list.



**Note** You must type your lines of text first and then add bullets after.

1. Type each line of text that you want to add bullets to.
2. Select all of the lines of text.
3. Click the **Bullet List** button to add bullets to your list. Each complete line will get a bullet applied to the front of it.

## List Ordered

Formats text into an ordered list. You can create the ordered list as you type, or after you have already typed in the lines of text.

1. Place the cursor where you want the list to start and click the **Ordered List** button.
2. Type the text you want and hit **Enter** to add the next list item.
3. To finish the list, press **Enter** twice. Press **Backspace** to delete any extra bullets or numbers in the list.

## New Paragraph

Creates a new paragraph rather than hitting the Enter key.

1. Place the cursor where you want to insert a new paragraph.
2. Click the **New paragraph** button.



**Note** Your system administrator can configure your Enter key to perform the same action as this key. Find out if using the Enter key will insert a <br> (line break) tag or <p></p> paragraph tags in the page code. If the Enter key has been configured to enter paragraph tags, you will need to use CTRL-Enter to enter a line break.

## Outdent Paragraph

Outdent shifts the entire paragraph to the left of its current position. It does the opposite of Indent.

1. Select the paragraph you want to outdent.
2. On the toolbar click the **Outdent** button.

The content editor increases the outdent by one tab stop per click.

## Paragraph Style

Applies a style from the drop-down list to a selected area of content. Styles in this drop-down are pre-defined Header styles and added by your system administrator in the HTML Editor configuration file.

1. Select the content on your page to apply styles to.
2. Click on the **Paragraph Style** drop-down and select the desired format option.

## Subscript Text

Makes the selected text lower than the rest of the line of text. For example: in the symbol H<sub>2</sub>O, the 2 is subscripted.

1. Select the text you want to format as subscript.

2. On the toolbar click the **Subscript** button.

## Superscript Text

Makes the selected text higher than the rest of the line of text. For example: in the symbol N<sub>2</sub>, the 2 is superscripted.

1. Select the text you want to format as superscript.
2. On the toolbar click the **Superscript** button.

## Underline Text

Underlines text as you type or after you have already typed it.

1. Select the text you want to underline.
2. On the toolbar click the **Underline** button.

# Digital Assets (Images, PDFs, Files)

## Insert Digital Assets

Insert a Digital Asset (image on a page or link to an image, PDF, text, multimedia file, etc.) into page content.

1. Place your cursor at the location where you want to insert the asset or select the text that will be used as the link to the asset.
2. Click the **Insert Digital Asset** button.
3. Locate the image in the Asset Library.
4. Click on the asset. When an image file is selected, the preview pane will display a thumbnail of the image selected, and a description of the file including the file type, size, alt tag, width and height.

When a document file is selected, the preview pane will display an icon of the file type selected, and a description of the file including the file type, size and title. When a flash file is selected, the preview pane will display flash settings and the ability to preview the file. The description displays the file type, size and title.

**Insert embed tag:** The embed tag currently has the widest consistent support across browsers; with just the object tag, entire Flash movie needs to download before Internet Explorer will start playing it (does not affect other browsers). The embed tag is deprecated in HTML 4.0+ and XHTML 1.0+ in favor of the object tag, this means at some time in the future, the embed tag may not be supported by browsers, whereas the support for the object tag will increase. Pages using the embed tag will not validate. **Width:** The display width in pixels. **Height:** The display height in pixels.

**Quality:** Low favors playback speed over appearance and never uses anti-aliasing. High favors appearance over playback speed and always applies anti-aliasing. If the movie does not contain animation, bitmaps are smoothed; if the movie has animation, bitmaps are not smoothed. **Play:** Specifies whether the movie begins playing immediately on loading in the browser. **Loop:** Specifies whether the movie repeats indefinitely or stops when it reaches the last frame. **Flash Menu:** Displays the full flash menu, allowing the user a variety of options to enhance or control playback, if not set; displays a menu that contains only the Settings option and the About Flash option. **Transparent:** The background of the HTML page shows through all transparent portions of the movie, this may slow animation performance.

**HTML Align:** Aligns the movie to the corresponding position within the browser window. When an audio or video file is selected, the preview pane will display flash

settings and the ability to preview the file. The description displays the file type, size and title. **Insert embed tag:** The embed tag currently has the widest consistent support across browsers; with just the object tag, entire Flash movie needs to download before Internet Explorer will start playing it (does not affect other browsers). The embed tag is deprecated in HTML 4.0+ and XHTML 1.0+ in favor of the object tag, this means at some time in the future, the embed tag may not be supported by browsers, whereas the support for the object tag will increase. Pages using the embed tag will not validate. **Width:** The display width in pixels. **Height:** The display height in pixels. **Align:** Aligns the movie to the corresponding position within the browser window. **Auto Start:** Specifies whether the movie begins playing immediately on loading in the browser. **Show Controls:** Displays the controls that allow the playback to be paused, stopped, etc. **Show Status Bar:** Displays playback status and time.

5. Select whether you want the asset to open in the **Same Window** (this option will insert an image on the page and create links to all other asset types); **New Window** (this option will create links to all assets types and have them open in a new browser window), or **Embed in Window** (this window will allow multi-media files such as audio, video and Flash to display within the content area).

6. Click **Insert**.

7. If inserting an image it may require additional editing to position correctly on a page, add a border or resize.

## Add Digital Assets to the Library

If an asset has not been added to the Asset library, it can be added using the Insert Digital Asset tool. None of the

Digital Assets Manager features are available through this tool.

1. Click the **Insert Digital Asset** button.
2. Click on the **Add** tab.
3. Type in a **Name** for the digital asset. This is the display name that will appear in the digital asset library.
4. Enter the **URL Title** of the digital asset. This is the title that acts as a file name for the page for friendly URL dynamic sites. For example a PDF file's URL title : "councilagenda" will create the file name "councilagenda.pdf". If you leave the URL Title field blank, the Title field is used for the filename. If you are not sure what type of site you have, speak to your System Administrator. Use only alphanumeric characters in the URL Title field. All other characters will be converted to the same replacement characters used throughout friendly URL sites.
5. Enter the **Description** of the asset. This field allows a maximum of 1000 characters.
6. Enter an **Alt Tag** for the digital asset. The text you enter here will be displayed when users place the mouse pointer over top of the asset image or link.
7. In the **Upload** field, click **Browse** and select the file to add to the library.
8. In the **Assign to Folder** field, select the digital asset folder you want to put the asset into.
9. Click **Insert**. This will add the digital asset to the digital asset library and insert it in the content editor window.

## Reupload Digital Assets to the Library

If an asset has previously been added to the Asset library, it can be edited and reuploaded using the Insert Digital Asset tool. This provides the same functionality as reuploading a digital asset through the Digital Assets Manager.

1. In the editor window, select the digital asset to reupload by clicking on the asset once.
2. Click the **Insert Digital Asset** button.
3. Click on the **Update** tab.
4. In the **Upload** field, click **Browse** and select the file to replace the current asset.
5. The Name, URL Title, Description, Alt Tag and Title fields can be edited at this time.
6. If the asset needs to be moved to a different folder, use the **Assign to Folder** field, and select the digital asset folder you want to move the asset into.
7. Click **Insert**. This will upload the new digital asset to the digital asset library and insert it in the content editor window.
8. Click **Cancel** and all edits will be canceled and the last version of the digital asset will be retained.



**Note** Depending on your individual browser cache settings the new image may not be visible until the page is saved or published and refreshed.

## Find Digital Assets

Search for a digital asset that has been uploaded into the Asset Library.

1. Click the **Insert Digital Asset** button.
2. Choose one of the following methods to locate the digital asset record:  
Using the Digital Assets Search  
by Digital Asset Folder
3. Once you have located the desired digital asset, click **Insert**.
4. When viewing search results in the Digital Asset Manager, you can sort the columns of information by clicking on the column headers. You can also view thumbnails (small images) of the digital assets in the search results by clicking on the **Show Thumbnails** checkbox next to the Search field.

## Positioning Images (absolute positioning)

Set the exact position of images on your page.

1. Insert the image into your page.
2. Click on the image to select it.
3. On the toolbar click the **Image Absolute Position** button.
4. You can now drag the image to the exact position for placement on the page.



**Note** The position you drag the image to is not the location the image will appear when published. The image will actually appear the same relative distance from the top left of the published page as it is from the top left of the content editor window.

For example: if you position the image to be 2 inches from the top and 2 inches from the left of the top left corner of the editor window, the image will appear 2

inches from the top and 2 inches from the left of the top left corner of the published web page. This means that while the image may not appear to be overlapping any information in your content editor window, it will probably overlap on the section menu and page header once published. Example: Absolute image placement in editor window

Example: Placement of same image when published As you can see the image is placed much further to the top left of the published web page than might have been anticipated.

## Inserting Links

Create Internal and External links within page content using the Link tool.

### Internal Links

A link on one page that links to another page within the same web site.

1. Position the cursor where you want the link to be, or select the text that will be used as the link.
2. Click the **Link** button to display the link insert dialog.
3. Make sure the **Internal Link** tab is displayed.
4. In the page explorer, locate the page you want to link to and click on it.
5. The **Title** field of the selected page is used by default for the link tool tip. This can be edited.
6. Select to open the linked page in the **Same Window** or in a **New Window**.
7. Click **Insert**.
8. To edit the link properties, right-click on the link and select **Set Link Properties**.

### External Links

A link on a page that links to a different web site or email address.

1. Position the cursor where you want the link to be, or select the text that will be used as the link.
2. Click the **Link** button to display the link insert dialog.
3. Click the **External Link** tab.
4. In the **Address** fields, enter the complete address of the page you want to link to. Click on the **Address** drop-down to see the types of addresses you can select. For example, to link to an email address, select **mailto** and enter the complete email address.
5. If you want to display the external link icon, check the **Icon** checkbox.
6. Enter the **Title** text for the link. This will become the tool tip text for the link.
7. Select whether you want to open the linked page in the **Same Window** or in a **New Window**.
8. Click **Insert**.
9. To edit the link properties, right-click on the link and select **Set Link Properties**.

## Anchor Links

Use anchors to create links to a specific location on either the same page or another page. The difference between anchors and links is that links can only jump to the top of a page whereas anchors can jump to a specific location on a page.

### Create Anchors

1. Position the cursor where you want to create an anchor. This is the location the link will go to.
2. Click the **Link** button to display the link insert dialog.
3. Click the **Insert Anchor** tab.
4. Enter a **Name** for the anchor. The name should be brief and unique to the page. The name will appear in the **Target** drop-down list on the **Anchor Link** tab. It will not appear on the web page.
5. Click **Insert**.

### Link to Anchors on the Same Page



**Note** Make sure you have already inserted anchors in the locations you wish to link to.

1. Position the cursor where you want the link to be, or select the text to be used as the link to an anchor.
2. Click the **Link** button to display the link insert dialog.
3. Click the **Anchor Link** tab.
4. In the **Target** box, select the anchor you want to link to.

5. Enter the **Title** text for the link. This text will become the tool tip for the link.
6. Click **Insert**.
7. To edit the link properties, right-click on the link and select **Set Link Properties**.

## Link to Anchors on Other Pages



**Note** Make sure you have already inserted anchors in the locations you wish to link to.

1. Position the cursor where you want the link to be, or select the text to be used as the link to an anchor
2. Click the **Link** button to display the link insert dialog.
3. Make sure the **Internal Link** tab is displayed.
4. In the page explorer, locate the page that has the anchor you want to link to and click it.
5. Click the **Anchors...** button. This displays a list of anchors available on the page you are linking to.
6. Select the **Anchor** from the list and click **Insert**.
7. Leave the **Title** as displayed or edit it.
8. Select whether you want to open the linked page in the **Same Window** or in a **New Window**.
9. Click **Insert**.
10. To edit the link properties, right-click on the link and select **Set Link Properties**.

## Edit/Remove Links

Removes links that were created using the Link tool in the content editor. If it is necessary to change a link so that it opens a different page or website it is good practice to remove the old link. Attempts to edit a link location often leave behind remnants of the previous link in the HTML and the new link may not function as expected.

1. Select the link you want to remove.
2. On the toolbar, click the **Unlink** button to remove the link.

## Custom Links

Links in this list are added to the system by the Site Designer or Administrator. This tool provides a method to have frequently used links inserted throughout a site in a standard format.

1. Position the cursor where you want to insert the link.
2. Click on the **Custom Links** drop-down.
3. Select the link to insert by clicking on it.

## Table Editing

### Insert a Table

If you want to create the table now but format it later, use the quick insert method.

1. Click where you want to create a table.
2. Click the **Insert Table** button.
3. Drag the mouse to select the number of rows and columns you want.
4. Right-click in the table to edit and format the table cells, columns and rows.

If you want to format the table as you create it, use the table wizard.

1. Click where you want to create a table.
2. Click the **Insert Table** button.
3. Click **Table Wizard**.
4. Complete the settings on the **Table Design** tab.  
**Plus or Minus Buttons** - Use these buttons to add or delete rows or columns.

To increase or decrease column or row size, click on the row or column that you want to resize and click the Plus or Minus button.

5. Complete the settings on the **Table Properties** tab.

**Dimensions** - Dimensions are entered either in pixels (px) or percentage (%). Pixels give a fixed table size that does not change. Percentage gives a variable table size that is always a percentage of the total content area size. Thus if the window is resized, so is the table. **Height** – This determines the height of the entire table. **Width** – This determines the width of the entire table.

**Layout** - Layout information is used to control the background color of the table, the alignment of the table within the content area and the cell spacing and padding. **Background** – Click on this option to select a background color for the table. **Alignment** – This aligns the entire table within the page. **Cell Spacing** – This determines the amount of space between cells in the table. **Cell Padding** – This determines the amount of space between the content in the cell and border of the cell.

**Border** - The Border settings allow you to indicate where within the table you would like borders to appear. You can also select the color and thickness of the cell and table border. **Size** – The size (thickness) of the border is set using the Plus or Minus signs at the top right of the Border settings. You can also type in a number to set the thickness. **Frame and Rules** – The buttons around the left and bottom sides of the Border settings allow you to choose what types of borders you want - top, bottom, all sides, around the outside of the table, etc. Hold your mouse over each of the buttons to see the tool tip describing what the button does.

6. Complete the settings on the **Cell Properties** tab.

**Content Alignment** - This determines the horizontal layout of the content within the cell.

**Background** - This determines the background color for the cell.

**Dimensions** - This determines the height and width of the cell. You can enter the height and width in pixels by placing a "px" at the end of the number you enter or in percentages by entering a "%" at the end of the number. If you enter a percentage it is a percentage of the total table width/height.

**Additional** - Allows you to add Content to a cell and indicate whether the contents of the cell should Wrap around at the end of each line.

7. Complete the settings on the **Accessibility** tab. The Accessibility feature adds HTML codes to your table such that it can be read by text readers and other technologies that allow the visually impaired to access your information.

**Heading Rows** - enter the number of rows (1 or 2) that contain the row headers. The text in these rows will be read as the row titles.

**Heading Columns** - indicate which columns (1 or 2) contain the column title information. These also can be read by text reading technologies.

**Caption** - enter a one to three sentence description of what the table is about.

**Summary** - "Summaries are especially useful for non-visual readers. A summary of the relationships among cells is especially important for tables with nested headings, cells that span multiple columns or rows, or other relationships that may not be obvious from analyzing the structure of the table but that may be apparent in a visual rendering of the table. A summary may also describe how the table fits into the context of the current document. If no caption is provided, it is even more critical to provide a summary." (taken from the W3C guidelines at <http://www.w3.org/TR/WCAG10-HTML-TECHS/> , retrieved 08/10/2005).

**Associate cells with headers** - "For data tables that have two or more logical levels of row or column headers, use markup to associate data cells and header cells." (taken from the W3C guidelines at <http://www.w3.org/TR/WCAG10-HTML-TECHS/> , retrieved 08/10/2005) For more information, see the W3C's guidelines, section 5 Tables.

## Edit a table

Edit a table you have already inserted into the content editor window. All table edit features are available by right-clicking on the table.

### Inserting Rows

1. Click where you want to insert a row.
2. Right click and select **Insert Row Above** or **Insert Row Below**.

### Inserting Columns

1. Click where you want to insert a column.
2. Right click and select **Insert Column to the Left** or **Insert Column to the Right**.

### Editing Table Properties

1. Right click on the table and select **Set Table Properties**.
2. Edit the **Layout** settings.
3. Edit the table **Dimensions**.
4. Make changes to the **Background** color for the table.
5. Edit the table **Border** settings.

6. Edit the **CSS (cascading style sheet)** settings if you wish.
7. Click **Update**.

### **Editing Cell Properties**

1. Right-click on the cell and select **Set Cell Properties**.
2. Select the **Content Alignment** for the cell.
3. Set the **Background** color.
4. In the **Dimensions** box, edit the cell **Height** and **Width**.
5. Check the **No Wrapping** checkbox if you do not want cell content to wrap.
6. If you want to add a **Background Image**, click the button beside the field and select an image file.
7. Select a **CSS Class** and **Style** for the cell.
8. Click **Update**.

### **Showing or Hiding Borders**

1. Right click on the table.
2. Click on **Show/Hide Borders**.

### **Turn Table Borders Off**

When a table is inserted, borders are displayed as a guide when entering data. The guide borders can be turned off so that you can see what the table will look like when published.

1. Place the mouse pointer anywhere inside a table.
2. Click the button to turn table borders on or off.

### **Delete a Table**

1. Move the mouse over the corner of the table you want to remove, until the mouse pointer turns into the table selector .

2. With the table selector displayed, click on the corner of the table. The table will now be selected and will appear as follows.

3. Click the button to remove the table.

## **Content Editor Utilities**

### **Redo and Undo**

To undo the most recent actions, click the button and select the actions to undo. To redo a recently-performed action, click the button and select the actions to redo.

### **Print**

Click the button to print the contents of the editor window.

### **Insert Symbol**

Insert symbols into your page content such as a copyright or registered trademark.

1. Click where you want to insert the symbol.
2. On the toolbar, click the button.
3. Select the symbol you wish to insert.

Your system administrator can add symbols to the list of available symbols. Instructions for adding symbols are available in the site design documentation.

### **Spellcheck**

Check the spelling of the page's content.

1. Click the button.
2. When a spelling error is found, you have the following options:
  - Ignore** – Ignores this specific word in this instance
  - Ignore All** – Ignores this word throughout the document
  - Add Custom** – Adds this word to a custom dictionary for the site
  - Change** – Changes this specific word in this instance
  - Change All** – Changes this word throughout the document

### **Horizontal Line**

Insert a horizontal line on your page.

1. Place the mouse in the location where you want to insert a horizontal line.
2. On the toolbar, click the button.

## Snippets

Insert frequently used content. Snippets are added to the system by the site designer and administrator.

1. Position the cursor where you want to insert a snippet.
2. Click the  button.
3. Click on the snippet you want to insert.

## Full Screen Mode

Use the  button to toggle back and forth between full screen mode and regular screen mode. Full screen mode expands the editor window to full screen size, allowing you to view more editor window content while editing.

## Format Sweeper

Use the Format Sweeper tool to strip your content of unwanted HTML tags. You may wish to do this when you copy text from one location to another to ensure that no unwanted formatting comes with the text. You can also use this to strip out any inline formatting, to ensure that only stylesheet styles are being used.

1. On the toolbar, click the  button.
2. From the drop-down menu, you can select to strip all HTML tags or just one particular type of tag.

## Module Manager



**Note** The features of the module manager are only available if the correct configuration information has been added to the HTMLEditorConfig file.

Use the module manager to turn editor utilities on and off.

1. Click the  button. Items with a green checkmark are turned on and those with a red **X** are turned off.
2. Click on an item to turn it on or off.
3. Click anywhere outside of the Module Manager to close the tool. These are the utilities you can control with the Module Manager:

**Statistics** - The Statistics utility displays a Word and Character count frame at the bottom of the editor window. As you type the system tabulates how many characters and words you have typed. It refreshes each time you hit Enter or click somewhere else with the mouse. The default status for this feature is Enabled.

**Tag Inspector** - When you are in editor view mode (not HTML view mode) and you cursor over a portion of the text that contains an HTML tag, the Tag Inspector displays the Document Object Model path of the tag. It allows you to easily select a tag in the hierarchy and remove it using the "Remove Element" button. The default status for this feature is Enabled.

**Properties Inspector** - This feature displays the most commonly used property settings for the currently selected tag. You can quickly configure these properties without opening a separate dialog. The default status is Enabled but it is not visible until the user selects it from the Module Manager drop-down.

**Real-Time HTML View** - The Real-Time HTML View feature displays the equivalent HTML code in a separate window, as you type WYSIWYG text into the content editor window.

## W3C Clean

Ensure your content complies with web content standards as defined by the World Wide Web Consortium (W3C). see <http://www.w3c.org/WAI>.

1. To diagnose the page content, click on the  button.
2. In the **W3C Validation** window, click **Diagnose**.
3. To clean the page content, click **Clean**.

# Question Editor

The Question Editor is opened any time you add fields to a form or survey page. The top section of the Question Editor captures the question text as well as the question type, placement and formatting information. The **Answers** section of the Question Editor is used for entering lists of possible responses from which your users will choose when answering the questions. The **Preview** section shows what the question will look like once it is published on the form or survey.



**Note** The fields available in the Question Editor depend on the type of question you are creating.

# Question Types

Questions and information fields described here are used on surveys, general forms and application forms. They are also used when Administrators set up metadata information.

## Single Answer Questions

**Radio Button:** Respondent must choose a single answer from a small number of possible answers. The system does not permit more than one radio button to be selected. **List (Single Selection):** Respondent must choose a single answer from a large number of possible answers. This type of selection box does not permit more than one selection at a time.

**Drop-down List:** Respondent must choose a single answer from a drop-down list of possible answers.

## Multiple Answer Questions

**Checkbox:** Respondent can make multiple selections from a small set of possible answers.

**List (Multiple Selections):** Respondent can make multiple selections from a large set of possible answers. Respondents can hold down the CTRL key and click on the multiple selections with their mouse.

## Text Box Questions

**Text (Single line):** Provides a single text line for entering the answer. **Text Area:** Provides a text area for entering a lengthy text answer. The maximum number of characters allowed for each Text Area box is 8,000.

## Formatted Questions

**Telephone Number:** Respondent must provide a formatted telephone number. **Email:** Respondent must provide a formatted email address.

**Date:** Used when you want the respondent to provide a date. **Date/Time:** Used when you want the respondent to provide a date and a time. **Country:** Used when you want the respondent to select a country for their answer. The list already contains all of the world's countries so you do not need to create the list.

## Email Results Questions

**Email Results:** Provides a field into which the respondent can enter an email address. A copy of the user's survey results are then sent to the address in this field. **Email Results From:** Uses the value entered in this field as the "From" value when the email notification is sent. **Email Subject:** Uses the value entered in this field as the subject line for the email submission notice. If no value is entered, the default subject line applies. **Email Results to Group:** Provides a field from which the respondent selects a group. A copy of the user's survey results are then sent to each member of the group. There are two variations of this question for single selection or multi-selection.



**Note** Groups must have the option Make Available to External Applications and Page Types checked to be visible in this list.

## Attachment Questions

**Attachment:** Allows respondent to attach a document or other file to the form. The functionality for locating and attaching the document is built in to the question already so all you do is provide the text telling respondents what you want them to attach.

## Ranking Questions

**Rank:** Used when you want respondents to indicate a preference, or rank available choices. User ranks answers by entering numbers in the edit boxes beside the choices.

## Custom Group Questions

**Single Select:** Used in the application form to select one group that has been made available for the application form.

**Multi-select:** Used in the application form to select more than one group that has been made available for the application form.

## Descriptive Content and Page Breaks

**Description:** Used to add some instructions or other text in between questions or sections. This type of text on a survey has no answers as it is used only for displaying information. **Category:** Used to add a category header to break up content. This type of text on a survey has no answers as it is used only for displaying information. **Page Break:** Used to display questions over multiple pages. Creating a page break requires no question or answers to be entered, it provides a visual reminder in your question layout as to what questions will appear on each page.

## CAPTCHAs

Though not a question, CAPTCHAs can be included at the end of every questionnaire in order to ensure that forms are being filled out by human beings and not automated scripts. CAPTCHAs can be enabled for the Application and Survey page types by selecting the **Include a CAPTCHA** checkbox in full edit mode.

# Adding Questions

1. On the **Content** tab of the form/survey, make sure you are in the Site Profile or Survey Questions section.
2. Click  and select the desired **Question Type**.
3. Type in the **Question Text**.
4. Select the **Question Placement** (Left or Top).



**Note** Selecting **Left** places the text of the question on the left and the answer options on the right. Selecting **Top** places the question text on one line and the answer options on the line below the question.

5. If a response is required, check **Response Required**.
6. Complete the remaining fields.
7. Click **Update** to preview the question.
8. Click **Save**.

## Copying Questions

Copy questions within a form or survey, or from one form to another. When you copy a question, the answer set for the question is also copied.

### Copy Questions Within a Form

1. Edit the form or survey.
2. Locate the question to copy and click the  button.
3. Position the cursor on the question below where you want to paste the question.
4. Click  to paste the question into the new location.
5. Edit the copied question and answers, and click **Save**.

### Copy Questions From One Form to Another

1. Edit the form or survey.
2. Locate the question to copy and click the  button.
3. Edit the survey you want to copy the question to. Be sure to edit the survey in **Full Edit** mode.
4. Position the cursor on the question below where you want to paste the question.
5. Click  to paste the question into the new location.
6. Edit the copied question and answers, and click **Save**.

## Deleting and Deactivating Questions/Answers

### Deleting Questions/Answers

Be aware that deleting a question permanently removes it and all historical data for that question from the database. This also holds true if you have an answer set, such as checkboxes or radio buttons. If you delete one of the answer options, it and the historical data for the option will also be permanently deleted from the database.

1. Locate the question or answer to delete.
2. Click  to delete the question/answer.
3. Click **OK** to confirm the deletion.
4. Click **Save** and submit for publication.

### Deactivating Questions

When you deactivate a question, this prevents it from being displayed on the published survey but it will still be visible on the survey in edit mode. The question can be made active later should you wish to use it again.

1. Locate the question to make inactive.
2. Uncheck the **Active** checkbox beside the question. This will prevent the question from being displayed on the published survey.
3. Click **Save** and submit for publication.

You can reactivate a question by editing the survey, locating the inactivated question and checking the **Active** checkbox again.

## Reordering Questions

1. Edit the form or survey.
2. Go to the section containing the questions you want to reorder.
3. In the **Order** column to the left of the question, click on the **Up** and **Down** arrows to move the question up or down in the order. You can also click on the **Number** and type in a new number that represents where in the order you want that question to fall.
4. Click **Save** and submit for publication.

# Image Editor

The image editor is currently only available in the the Digital Asset Manager. Ask you system administrator for access to the image editor if necessary.

## Edit Digital Asset Images

1. In the Digital Asset Manager, browse or search for a Digital Asset Image file. The file can be any gif or jpg file.
2. Open the image asset for editing by selecting the asset name.
3. Under the preview image of the asset, select the **Edit** link to open the image editor.

### **Image Zoom**

The zoom function is located at the bottom right of the Image Editor. The zoom does not affect the output of the image but only how it is displayed in the Image Editor. Zoom in or out by selecting the desired zoom value. Below the zoom feature, the dimensions and size of the image are displayed. This information is static and will only update if changes to the image are saved, the image is closed and re-opened.

### **Resize Image**

1. Select the **Resize** tab on the right side of the editor.
2. Select the **by Pixel** or **by Percentage** radio button.
3. Enter a new value (in pixels or percentage of original) for the **Width** of the image.
4. Enter a new value (in pixels or percentage of original) for the **Height** of the image.
5. If the **Maintain Aspect Ratio** checkbox is selected, the width or height values will automatically update if one or the other is changed. This will make certain that the image is not skewed when one of the dimension parameters is changed.
6. Click **Resize** to resize the image.
7. Click **Undo Changes** if you wish to reverse your changes.

### **Crop Image**

1. Select the **Crop** tab on the right side of the editor.
2. You can select the area of the screen you wish to crop by clicking and dragging your mouse. The area inside of the red box will be preserved once the crop action takes place.
3. You can manually define the dimensions and position of the crop box using the following text fields.
  - a. **Offset X** – this is the number of pixels that the top left corner of the crop box should be away from the left side of the image.
  - b. **Offset Y** – this is the number of pixels that the top left corner of the crop box should be away from the top of the image.
  - c. **Width** – this is the width of the crop box in pixels.
  - d. **Height** – this is the height of the crop box in pixels.
4. Click **Crop** to crop the image.
5. Click **Undo Changes** if you wish to reverse your changes.

### **Flip/Rotate Image**

1. Select the **Flip/Rotate** tab on the right side of the editor.
2. To rotate the image, select one of the 3 options of **90°**, **180°**, or **270°** and click the **Flip/Rotate** button. The image will rotate clockwise.
3. To flip the image, select **Horizontal** or **Vertical** and click the **Flip/Rotate** button.
4. Click **Undo Changes** if you wish to reverse your changes.

### **Save or Save As**

You have the two options for saving your changes to the image. Clicking the **Save** button will overwrite the original image with your changes. Clicking the **Save As** button will allow you to create a brand new image asset without affecting the original asset. In both cases, the image is saved as a jpg file.

# Publish and Emergency Publish

This section describes the difference between the Publish and Emergency Publish functions in ACM. In general, Emergency Publish should be used only in the case of emergencies since it bypasses workflows processes for a page.

## Publish

The Publish functionality can be commenced manually or automatically following the completion of workflow.

Depending on whether your site is Dynamic or Static, the actions that occur will vary. Prior to the described actions below, the page will have been forced to progress through any workflow configured on the page.

### **Dynamic Site**

For a Dynamic Site, the “Publish” action will:

8. Update the “Last Published Date” for the page.
9. Set the page status to “Published”.
10. Update the page content on the Dynamic Site.

### **Static Site**

For a Static Site, the “Publish” action will:

1. Update the “Last Published Date” for the page.
2. Set the page status to “Published Pending Export”
3. Update the page content after the next scheduled or unscheduled export.

## **Emergency Publish**

The Emergency Publish functionality should be used only when content must be updated immediately without being forced to go through normal workflow processes or wait until the next scheduled export. Depending on whether your site is Dynamic or Static, the following actions will occur.

### **Dynamic Site**

For a Dynamic Site, the “Emergency Publish” action will:

1. Bypass any workflow configured for the page and publish the content immediately to the site.
2. Update the “Last Published Date” for the page.
3. Set the page status to “Published”.

### **Static Site**

For a Static Site, the “Emergency Publish” action will:

1. Bypass any workflow configured for the page.
2. Immediately export the page and any assets associated with the page to the static web server.
3. Update the “Last Published Date” for the page.
4. Set the page status to “Published”.

# **Glossary**

## **absolute position**

When you set an image to have absolute position, it means that the image no longer conforms to the regular flow of text and images on the page. When setting an absolute position, the image is positioned at a fixed number of pixels from the top left portion of the frame it is located in. An absolutely positioned image may even overlap other text or images on your page. This is because the image is fixed in a specific location and thus does not flow around any other text or images.

## **action menu**

The action menu is available only when you use the Quick Edit mode to edit your web pages. The button appears beside the edit buttons beside the page title. The action menu includes: publishing, previewing, saving and canceling functionality.

## **anchors**

Anchors are used for creating links to a specific location on either the same page or another web page. The difference between anchors and links is that links can only jump to the top of a page whereas anchors can jump to a particular spot on a page.

## **archive**

When you archive a web page or a survey/form question you permanently remove the item from your web site. If you want to keep a web page or question but have it not be visible on your site, you must inactivate the page or question by deselecting the Active checkbox.

## **attachments**

The Attachment page type allows you to provide a link to a digital asset (image, document, text file, PowerPoint presentation, excel spreadsheet and others). You can control whether the attachment links are displayed in the content area, the navigation area, or on both areas of your web pages. Placing the attachment link in the content area allows you include the link in the child links list. This is useful when the child page list needs to link to a variety of content.

## **calendar**

The Calendar page type allows you to display calendar items in a graphical or non-graphical format on your web site. These pages also can be set to allow users to post an event to the calendar.

### **category pages**

Use category pages to create drop-down menus in your site's navigation area. The category you create appears as a link on the navigation pane and when you click on it, a list of pages that the user can go to are listed in the drop-down menu. The pages that the user can go to are the child pages of the category page. Using this page type adds an additional navigational tool for users of your site.

### **child links**

Child links refers to the links that appear in the main content area of a parent page once it is published. The list of links, which generally appears at the bottom of the page content, provides links to each of the child pages created under that parent page. The child links area is created through an IronPoint tag added to your template.

### **child pages**

Child pages belong to a parent page and appear on the Child Pages tab of the parent. Child pages can be created for all page types with the exception of the Login pages. It is not recommended that you add child pages to Login page types.

### **content approvers**

Content approvers are users who have been given the rights and the responsibility for approving page content created by other users. Content approvers are part of the workflow of creating and publishing pages. Once a page is created and saved, it gets submitted for approval. The Content approver can then approve or reject the pages.

### **content editor**

A content editor is a user within your organization who has been given rights to edit content that others have created.

### **content management system**

A Content Management System (CMS) is software empowers users across an organization to create and publish content in an organized and timely fashion. A CMS makes content management easy by allowing non technical, front-end content providers to create, edit, publish and maintain pages, sections or entire sites, depending on the needs and size of the organization. Content management systems keep design and content functionality separate which facilitates easy changes to the design of your web site.

### **content providers**

Content providers or content authors as they are sometimes called, are users who are authorized to create web page content. Content providers can create content only in the areas to which they have been given access by the system administrator.

### **CSS class**

CSS stands for Cascading Style Sheets. A CSS Class refers to an additional made to HTML for controlling presentation of a document, including color, fonts, alignment, etc.

### **diagnose tool**

The diagnose tool scans the page's HTML code to determine if there are problems such as incomplete HTML tags or other issues that will create errors once the content is published.

### **digital asset gallery**

The digital asset gallery is a folder structure that contains all of the images and other files that are available for you to include in your web content. The gallery is displayed as a hierarchical folder structure that keeps your digital assets organized. Only authorized users can add images and files to the gallery. Once they have been added, they are available to authorized content providers to use when creating web pages.

### **digital assets**

This refers to photos, clipart, PDF files, audio, video and other types of files that you can insert on or attach to your web pages. Digital assets are stored in the digital asset gallery which is a library of files available for use on your web site. Only authorized users can add digital assets to the library for use on the web site.

### **dynamic publication**

Dynamic publication exists when the published version of your web site integrates with the Active Content Manager. The other option is static publication in which the web site content is maintained in one location, then a copy of it is exported to another server and made available on the Internet.

### **edit icons**

The edit icons consist of the Full edit, Quick edit and Action menu. They are only visible once you have logged into your CMS and have been given rights to edit that page. These buttons are used for opening your pages in edit mode where you can make changes.

### **edit mode**

When you log into the Active CM, the editor icons appear at the top of the pages you are authorized to edit. There are two types of edit icons: quick edit and full edit (link to explanations of these modes). When you click on one of the edit icons, the page is displayed in edit mode - indicating you make changes to the text, images and settings for the page.

### **export**

A term used to describe the process of taking information from the ACM and copying it to a static web site.

### **follow-up task**

Each page can have a follow-up task. The follow-up tasks available for most page types are Review, Inactive, Archive or None. The date by which the follow-up tasks take place are entered on the Workflow tab for each page. Your system administrator can set default follow-up tasks and dates to ensure pages will be reviewed at appropriate intervals.

### **full edit mode**

Full edit mode opens the content editor for editing web pages. In Full edit mode you can change the content as well as the properties and settings for the page. Quick edit mode provides in-context editing so that content providers can work on the content of a particular page within the framework of the page as it appears when published.

### **general content pages**

This is the most commonly-used page type. General Content pages provide a basic text box area into which you can type textual content, insert images and files, as well as other graphic material.

### **home pages**

Your system administrator is normally responsible for creating the home page for your site. Access to the edit functions for the home page are usually restricted to authorized users within your organization. A Home page type is created automatically each time a new site is created.

### **hybrid**

There are some page types that interface with the software database in order to pull information from, or save information to the database. If you have a static site these pages are considered to be "Hybrid" pages and are identifiable by "PageMode=Hybrid" at the end of the page address. The Login and Survey page types are two examples of a hybrid page type.

### **join form page**

This is a field in the General Properties section of Login pages. If you have an application form that users can fill out to apply for a user account, check this checkbox and then click on <<Select Page>> and select the application form to use. This will place a link on your login page for users to click to apply for a user account.

### **link pages**

The Link page type provides the functionality for creating internal and external links on your web pages. Links can be added to the content area of your web pages but they can also be included as a link in the navigation section of your page. Link page types also allow you to specify if you want the linked item to open in new window, in the current window or within a frame on the page.

### **location**

Also known as breadcrumb trail or cookie crumb trail. When pages are created within the site, a natural hierarchy is created and reflected in the location line which is like a map to and from your page location. The location line is displayed while in edit mode and can be displayed on your published web pages using an IronPoint tag in the template.

### **login pages**

The Login page type is used to authenticate users. More than one Login page can be used on your web site and each login page allows you to specify a different page to be displayed automatically after the user has logged in (post-login page).

### **metadata**

Metadata is data about data. Your system administrator sets up metadata information for you to attach to each web page you create. When you assign metadata to a web page, hidden tags get attached to the page that help to identify the subject matter of the page. Web search engines are then able to read the metadata tags when performing searches. This helps users find your pages when they use terms related to your web page's content.

### **monitors**

Monitors are people within your organization that receive notification when content has changed. Monitors are generally responsible for monitoring portions or all of the web site changes.

### **my page**

My Page is your personal information and user preferences page. On My Page you can view your personal information and rights, change your password, and view My Reports.

### **navigation section**

The navigation section of your web site is the portion of your site usually found on the left-most side of each web page that contains the menu structure for your site or the navigational links that allow you to jump to other areas of the site. Some web sites place their navigation section along the top of the main content area in a horizontal menu-like fashion.

### **ordered lists**

Ordered lists are those that are numbered, or ordered using an ascending series of identifiers such as 1, 2, 3, or a, b, c, or i, ii, iii, iv, etc.

### **outdent**

An outdented paragraph is one where the first line of the paragraph is further to the left than the remainder of the paragraph. They are also known as hanging indents.

## **page title**

This is a required field for every web page you create. The title you enter here appears at the top of the page you are creating.

## **page types**

Page types are formatting functionality that define how the central content area of each page will look. There are a number of standard page types included the standard ACM installation. Page types provide standard formatting for creating the content for login pages, general content pages, links and attachments, forms and surveys, photo gallery pages, user account application pages, and more.

## **pagelets**

If there is content that is used repeatedly throughout your web site, you can create a single instance of the content that can then be used over and over throughout your web site. These single instances are referred to as Pagelets.

## **parent pages**

A parent page is any page within your web site that has pages below it in the web site hierarchy (there are pages on the Child Pages tab). When adding web pages, you need to determine where in the hierarchy the new pages will be. You then edit the parent page and add them on the Child Pages tab.

## **photo gallery**

The Photo Gallery page type allows you to display photos in a static or slide show format on your site. When you create the gallery, you indicate which folders in your Digital Assets Library you wish to attach to the page. When the page is displayed, any photos found in that folder will be displayed on your Photo Gallery page.

## **placeholder**

Each page type has its own HTML content placeholders that control the type of content that can be entered on the page and the formatting options for the content.

## **post login page**

This field is in the General Properties section of Login pages. Use this field to specify which page you want displayed after users log in.

## **publish**

When you publish content it becomes visible on your web site. The steps that lead up to publishing a page are defined by workflows. Pages are generally created, edited, reviewed, edited, approved and then published.

## **quick edit mode**

Quick edit mode only allows you to create and edit the content of the HTML editor windows for a page. You cannot change properties and other settings for the page. Full edit mode opens the full-featured content editor. In Page Editor mode you can change content as well as page properties and settings.

## **search pages**

The Search page type provides functionality for creating a site search for your web site. You can specify whether the search is for the one site only or for all of the sites management by your ACM.

## **section menu**

Section menus provide links to other major content areas within your site. You can add section menu links to other pages or attachments. The links appear in the navigation portion of your web pages, usually on all pages throughout your site.

## **site map**

The Site Map page type provides functionality that automatically creates a site map for your web site. You can define what types of links will be displayed and how many page levels will be available.

## **site menu**

The Site Menu is another navigational tool available to users of the Active CM. When you log into the ACM, the Admin toolbar is displayed above the web page content. The Site Menu drop-down shows one or more levels of your site's pages. The levels visible on the site menu are set by your system administrator.

## **slide show**

Using the Photo Gallery page type, you can create a slide show of photographs for your site's users. The alternative to a slide show is to display the photographs in a static gallery form.

## **snippets**

The Snippets feature is located on the HTML editor window toolbar. Use this feature to insert snippets of commonly-used code. Using snippets allows you to quickly insert pre-defined text and HTML tags without have to type them in each time.

## **static publication**

Static publication exists when your organization maintains two copies of your web site, one on a server that is used for creating and editing content, and another that is used for your public web site. When changes are made on the in-house version of your site, they do not appear on your organization's web site until your system administrator copies the changes to the published version of your site. The other option is called Dynamic Publication in which your Active

Content Manager is fully-integrated with the completed published version of your web site. Users can log on to the web site, make changes to content, submit the new content for publication and once it is approved for publication, the changes are immediately visible on your live web site.

### **survey pages**

This page type is used for creating forms for your site that your users can fill out and submit. This would include surveys and order forms or any other type of information gathering form, with the exception of a user account application form.

### **sweeper**

The Sweeper feature is located on the toolbar in the HTML editor window. You can use Sweeper to scan the page's content for: HTML tags, MS Word formatting, cascading stylesheets, font and span tags.

### **teaser**

Each page has a Teaser text box in the General Properties section of the Content tab. You can enter a description of the text that will tell users what the page content is about.

### **templates**

Templates define how the header, footer, navigation and other features of a site are designed. By assigning templates to pages, consistency is maintained across the site.

### **view mode**

View mode refers to the state you are in when you log into the Active CM but you have not yet opened the editor to edit a page. In view mode you see the web content much as it appears on your published web site but you can also see the edit icons beside the page title.

### **W3C**

The W3C feature is available on the toolbar of the HTML editor window. It allows content providers to diagnose and clean their page content in order to comply with the World Wide Web Consortium's Web Accessibility Initiative guidelines. see [www.w3c.org/WAI](http://www.w3c.org/WAI)

### **workflows**

A workflow consists of a number of steps required to successfully complete a task. In the ACM, workflows are used to ensure that your web pages go through a number of predefined controlled steps that ensure they will be edited, reviewed and approved before being published on your web site. Workflows are generally maintained and assigned to pages by a small group of authorized users within your organization.

### **WYSIWYG**

Stands for What You See Is What You Get. Refers to how your text editor displays information you type in. A WYSIWYG editor displays information exactly as it will appear as you enter it.

# Appendix A

## Link Types

There are a number of ways to create links within the Active CM.

### **Content Links**

Links within your page content are made using the Content Editor - Link tool. Links created in the content editor window:

- are displayed as a part of page content
- cannot be displayed on the section menu
- can be internal or external links

### **Child Page Links**

Each Parent page will display a list of Child Page titles in the assigned location (as set in the templates). Child Page Links can also be set to include page summary/teaser information.

### **Section Menu Links**

Section menus will display a list of Child Page titles reflecting the order from the Child Page table. Child Pages appear in the section menu using the Page Design Detail settings from the Site Design Manager.

### **Navigation Links**

Some of the Active CM page types are used specifically to create a method of navigation:

#### **Link Page Type**

Used to create a link to internal or external pages that can have a number of different properties and characteristics. This link can be visible in both the Child Page List and Section Menu. It is good practice to not create child pages under a link page. The purpose of the link page is simply to take the user to a different site or page within a site. If you want to create a sub-menu type link on the Section Menu, use the Category page type. Links created using the Link page type:

- Are often used to create a menu link to a page in a different section of the website.
- Can force one or more popups to be displayed and accepted or rejected by the user prior to proceeding to the

linked page (e.g. if you want a user to read a disclaimer or license agreement prior to reaching the linked page). *Only from child page list.*

Allow you the option of displaying a popup containing additional descriptive information about the link. *Only from child page list.*

### **Attachment Page Type**

Used to create a link to Digital Assets that can have a number of different properties and characteristics. This link can be visible in both the Child Page List and Section Menu. Links created using the Link page type:

Allow you the option of displaying a popup containing additional descriptive information about the link. *Only from child page list.*

Allow you to display size, type and icon associated with the Digital Asset. *Only from the child page list.*

### **Category Page Type**

Used to create a place holder in the section menu. This page type does no display content, but provides a method for grouping child pages of similar content. This link is not visible in the Child Page List.

### **Quick Links Page/Pagelet**

The Quick Links page type is the most flexible link-building feature available in the Active CM. It allows you to build a page of different kinds of links from different sources. This is useful for creating lists of News items or What's New links on your site. Links created using the Quick links page type:

Are displayed in the order you specify, in between the Introduction and Conclusion text.

Cannot be displayed on the section menu.

Can include internal and external links.

Can be a combination of any number of child links from one page with any number of child links from another page



**Note** The standard installation of the Active CM does not include the Quick Links page functionality. If you would like more information about this page type, contact your Active sales representative.

# Appendix B

## TinyMCE WYSIWYG Editor

The Moxicode TinyMCE WYSIWYG Editor has been added to ACM as of version 8.6. The editor functions very much like the existing Telerik r.a.d. editor but loads faster, outputs cleaner code and offers some features not available with the current editor.



**Note** The TinyMCE Editor will always insert the <p> paragraph tag when a user hits the Enter key. This is different than the default setting for the r.a.d. editor which uses a <br> tag. If you prefer to use a <br> tag instead of <p> for paragraph breaks, you can simply hit Shift+Enter in the TinyMCE editor or use the r.a.d. editor.

These are the commonly used icons:

### **Paragraph Alignment**

There are four different ways you can align paragraphs. **Align Left** - aligns selected text with the left margin **Align Center** - centers selected text between margins **Align Right** - aligns selected text with the right margin **Justify** - distributes selected text evenly between margins

### **Bold, Italics, Underline Text**

These buttons format text as you type or after it has already been typed.

1. Select the text to bold.
2. On the toolbar, click the **Bold, Italic** and/or **Underline** button.
3. To remove bolding, select the text and click the button again.

### **Cut/Copy and Paste**

Copies a section of text or graphics from one location and pastes to another.

1. Select the item you want to copy.

2. On the toolbar, click the **Copy** button.
3. Position the cursor on the location to copy to.
4. Click the one of the **Paste** buttons.

**Paste** - pastes content exactly how it was copied, including formatting **Paste as Plain Text** - pastes content as plain text without any formatting. **Paste from Word Document** - Strips out any unnecessary code from content copied from a Word document.

## Font Name and Size

Changes the style and size of selected text.

1. Select the text you want to change.
2. On the toolbar, click on the **Font Family** drop-down and select a new font.
3. Click on the **Font Size** drop-down to select the font size.

## Font Color

Changes the color of selected text.

1. Select the text you want to change.
2. Click the **Text Color** button and select a color.

## Apply Background Color to Text

Applies a background color to a selected text area.

1. Select the text to highlight.
2. Click the **Background Color** button and select a color.

To remove highlighting, select the text and set the background color to be the same as the background color of the rest of the page.

## Apply Styles

Applies a style from the drop-down list to a selected area of content. Styles in this drop-down are pre-defined formats added by the Administrator.

1. Select the content on your page to apply styles to.
2. Click on the **Styles** drop-down and select the desired format option.

## Indent Paragraph

Moves the paragraph to the right, away from the left-hand margin of the page (also used to create a sub-list).

1. Select the paragraph you want to indent.
2. On the toolbar, click the **Indent** button.
3. The content editor increases the paragraph indent by one tab stop per click of the Indent button.

## Outdent Paragraph

Outdent shifts the entire paragraph to the left of its current position. It does the opposite of Indent.

1. Select the paragraph you want to outdent.
2. On the toolbar click the **Outdent** button.
3. The content editor increases the outdent by one tab stop per click.

## Lists Unordered (bulleted)

Formats selected text into a bulleted list. You can create the bulleted list as you type, or after you have already typed in the lines of text.

1. Place the cursor where you want the list to start and click the **Bulleted List** button.
2. Type the text you want and hit **Enter** to add the next list item.
3. To finish the list, press **Enter** twice. Press **Backspace** to delete any extra bullets or numbers in the list.

## List Ordered

Formats text into an ordered list. You can create the ordered list as you type, or after you have already typed in the lines of text.

1. Place the cursor where you want the list to start and click the **Ordered List** button.
2. Type the text you want and hit **Enter** to add the next list item.
3. To finish the list, press **Enter** twice. Press **Backspace** to delete any extra bullets or numbers in the list.

## Subscript Text

Makes the selected text lower than the rest of the line of text. For example: in the symbol H<sub>2</sub>O, the 2 is subscripted.

1. Select the text you want to format as subscript.

2. On the toolbar click the **Subscript** button.

## **Superscript Text**

Makes the selected text higher than the rest of the line of text. For example: in the symbol N<sub>2</sub>, the 2 is superscripted.

1. Select the text you want to format as superscript.
2. On the toolbar click the **Superscript** button.

## **Insert Table**

Opens the table dialog window to allow you to create a custom table. When the table has been created, you can use the table buttons to changes characteristics of the table. The table buttons are as follows: Table Row Properties Table Cell Properties Insert Row Before Insert Row After Delete Row Insert Column Before Insert Column After Remove Column Merge Table Cells Split Merged Table Cells

## **Insert Digital Assets**

This button will open the digital asset window to allow you to add or update a digital asset

## **Add Remove Links**

Use these buttons to link or unlink selected text or to add an anchor link to the page.

## **HTML Mode**

Use this button to jump to an HTML view of the current content in the editor. The HTML is displayed in a separate window.