CivicCMS Basic Training Manual
Schools Platform

v.81617

CIVICCMS

1.0 Introduction

This document will provide you with the basic information that will allow you to perform the fundamental activity of maintaining and creating content for the website. It does not describe every command in full detail but rather is intended to be used in conjunction with subject matter learned during your training session.

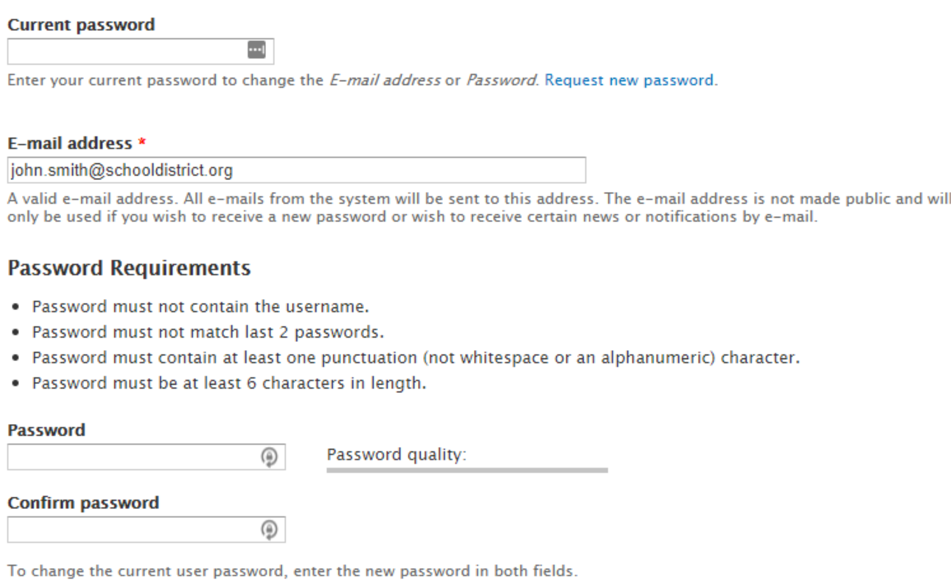
2.0 How To Login and Change Password

Login

Look for a Login button on the website *(typically located in the header or footer of the site),* then click on it and this will bring you to a login screen where you will need to enter your User ID *(not email address)* and password.

Password Change

Once logged in, click the My Account link at the bottom of the webpage. Click the **Edit tab** and the section shown below will be displayed. Change password by entering the new password in the boxes shown below and clicking the **Save** button



3.0 What Happens When You Login

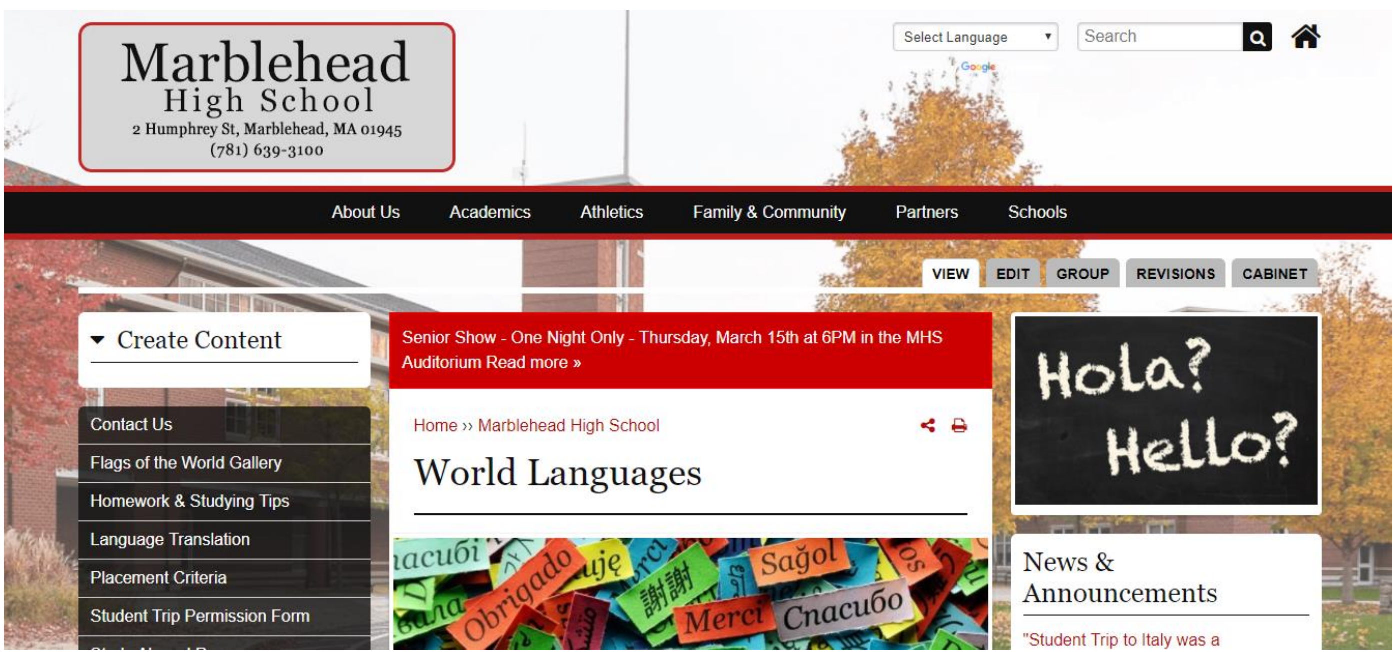
1. On the left-hand side, you will see the "Create Content" pane (see image below). Commands listed in this section are used to create new content and will be described in this manual. To expand the menu to see all available commands, simply click on the black down arrow head.

2. You will also see a series of tabs to the top right-hand side of the webpage named View, Edit, Group, Revisions, and Cabinet.

    a. The Edit button allows you to enter the edit mode used to make changes to existing content you are currently viewing on the site.

    b. Revisions allow you to see changes that have been made to a webpage since it was previously saved *(note that changes are displayed in HTML, red font color)*

    c. The Cabinet tab brings you to an area where all web content associated with the Group (Department or Board) you are working on is listed.



4.0 Cabinet - Overview

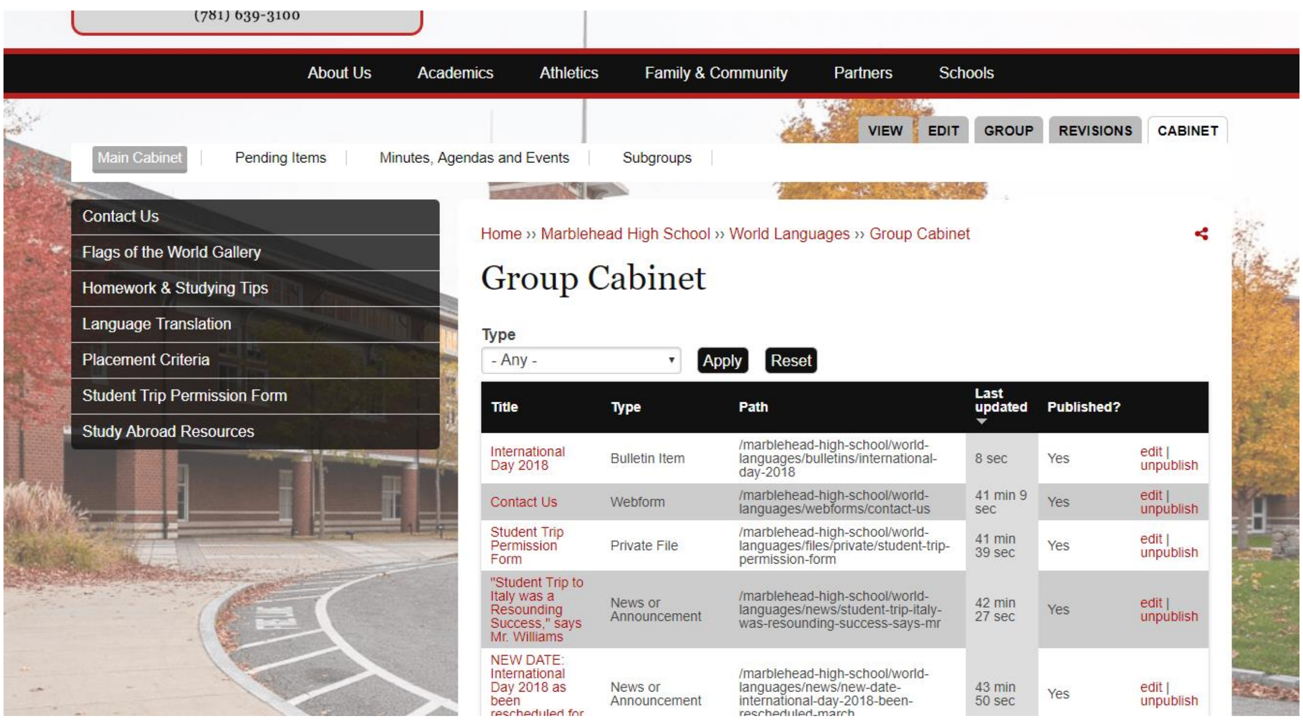
- From the Group (Department or Board) home page you will see a Cabinet tab listed towards the top of the right-hand side of the webpage. Clicking on this will bring you into the Cabinet, where you will see a listing of all items that belong to the Group (Department or Board) including files, links, faqs, web pages, etc. Content created from respective Create Content pane is automatically placed in Cabinet.

  Please Note: The Cabinet tab is only accessible when viewing the Group (Department or Board) home page.

- **Sort Capability** - Clicking on the column heading text will allow you to change the sort order of what you are viewing. This will assist you in finding an item that was recently added or modified.

- **Publish & Unpublish** - Clicking on this link will either take the webpage *off* the website or place the webpage *on* the website. *Unpublishing does not delete the content, merely hides it from website visitors. Unpublished content can easily be found via the Cabinet tab.*

- **Edit** - Will allow you to go directly into edit mode for that row's item.

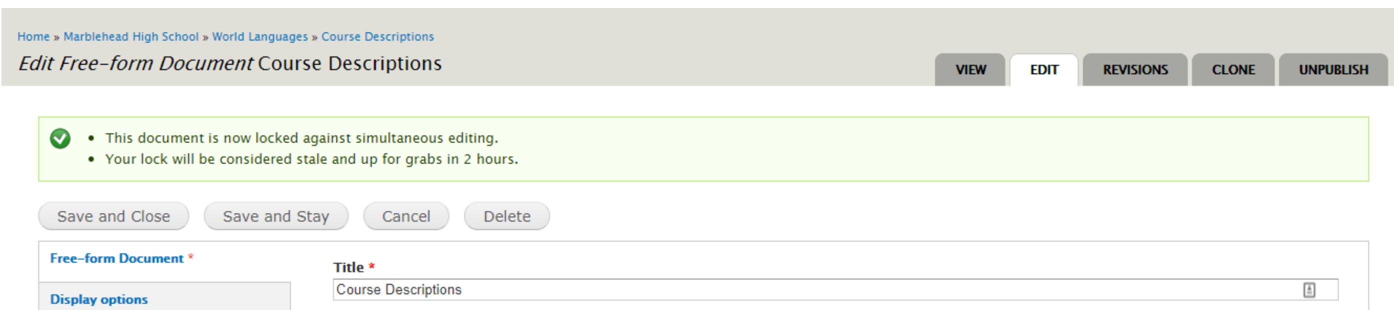


5.0 Saving Changes & Deleting Items

Saving - When you have finished creating a new item *(webpage, FAQ, event, etc)* or modifying an existing item, you always need to click the **Save and Close** button located at the top or bottom of the screen you are working in. This will save the changes and publish them to the website. There is also a **Save and Stay** button that will save your changes and allow you to continue to make more changes to the item you are working on in Edit mode.

Cancel - Will allow you to exit from the page, any changes not saved will be ignored.

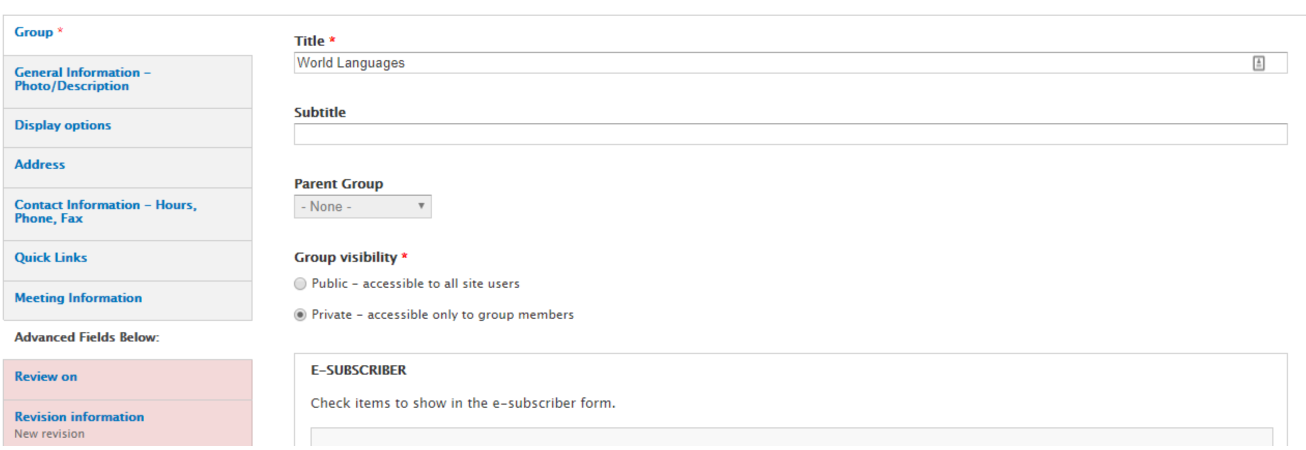
Deleting - When looking to delete an existing item, you will need to edit the item and click on the **Delete** button shown below. **It will ask you to confirm deletion but once confirmed *the item is permanently deleted and cannot be easily recovered.***



6.0 Editing Group (Department or Board) Home Page

When editing a Group (Department or Board) home page, there are a number of light grey tabs on the left hand side of the form that you will be using. **Only use the light pink tabs when instructed to do so by CivicCMS.** Each tab contains different fields of information for your Group (Department or Board).

Group Tab

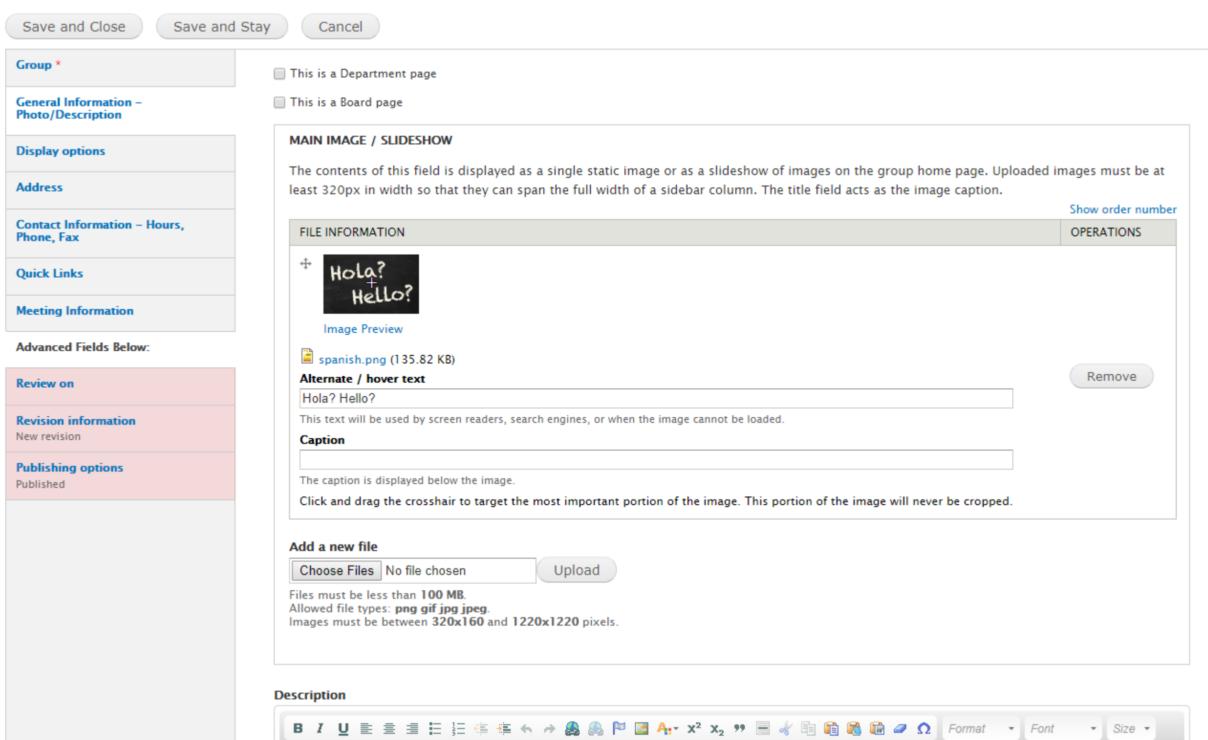


Title - Title of the Group page. This will show up on the top of the page when you view the group on the site.

Subtitle - Subtitle of the Group page. This will display under the title when you view the group on the site.

E-Subscriber - Check the boxes that you want to allow website visitors to register for mailing lists so they will receive emails when sent regarding those topics. Most common are Minutes, Agenda, News & Announcements and Urgent Alerts. *If you forget to check off this checkbox, e-subscribers will not get an email notification.*

General Information - Photo/Description Tab



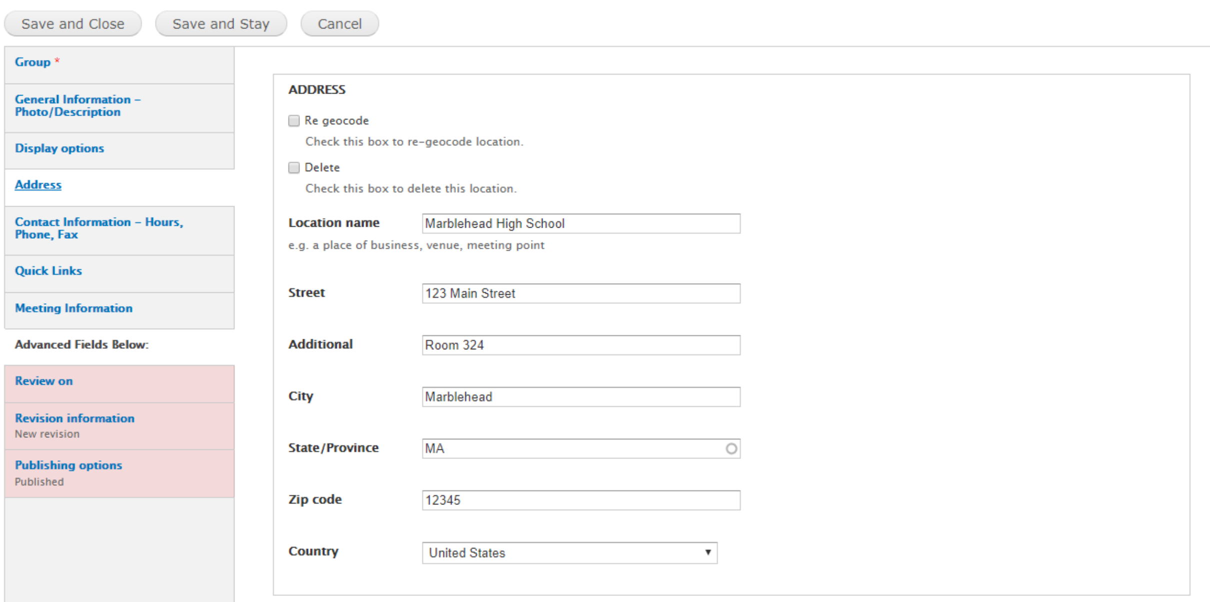
Main image / Slideshow - Allows you to upload an image or slideshow of images on the group home page, which will automatically appear on the upper right-side. Click **Choose Files**, select image to upload; click **Upload**. *Internet Explorer and FireFox browsers have a **Browse** versus **Choose File** button.*

After uploading a photo, you will be required to add **Alternate Text** *(used for screen readers* *and ADA Website Compliance)* and an **Image Title** *(shows up when you hover your mouse over the image.)*

Image caption - Enter text in this field that will display under the uploaded image.

Description - Free-form area where you type or paste the text that will be displayed on your Group (Department or Board) webpage *(functions similar to Microsoft Word or the message section for email).* Often used for the Mission Statement or a Description of Our Department. **See Section 20 for more detail about Free-Form**

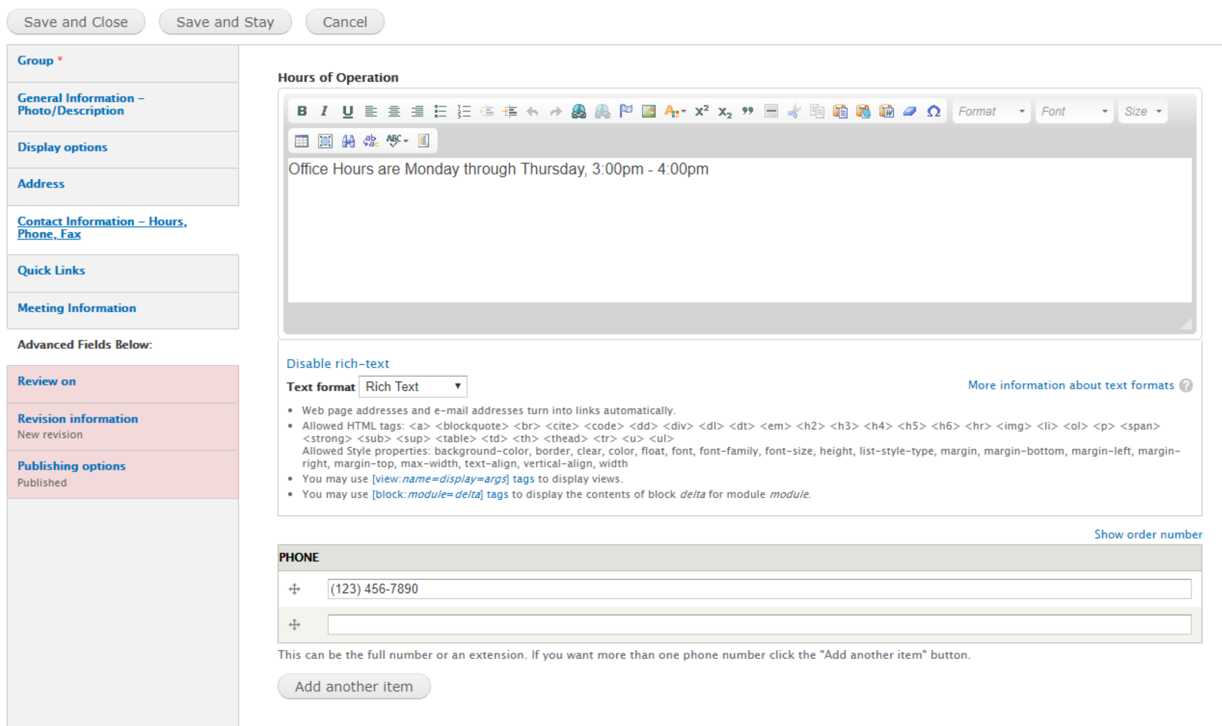
Address Tab



Location name - Label like “High School” or “Middle School Gym”

All other fields are standard address fields and display in the order seen. *Please be as specific as possible when entering address, Google Maps automatically creates a location link*. Click Save upon completion of fields.

Contact Information - Hours, Phone, Fax Tab



***Hours of Operation** - Free-form area where you type the Hours of Operation that will be displayed on a webpage *(functions similar to Microsoft Word or the message section for email)*

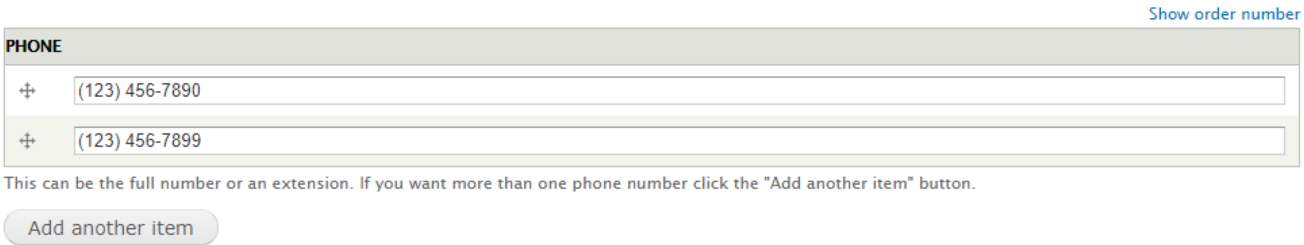
**Underlining functionality and Uploading Images are disabled in this field*

Examples:

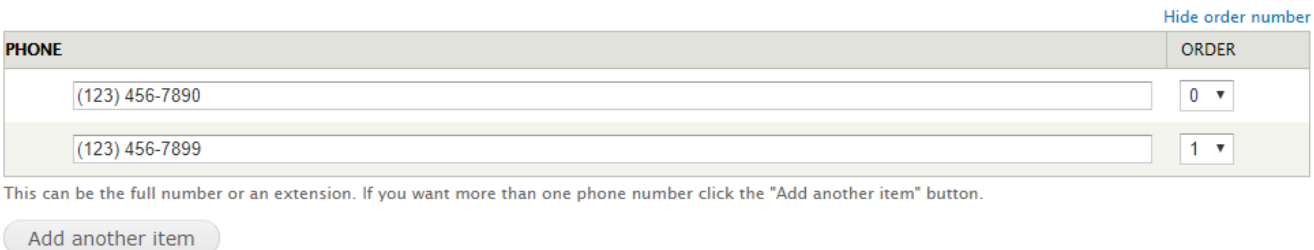
- Monday, Wednesday & Friday 8 am - 4 pm
- Tuesdays - 3:30pm to 4:00pm

Phone, Fax, Emergency Numbers, and After Hours Phone Number fields you can add multiple phone numbers, or one per field. For example, if your department has two phone numbers, you can enter the first number in the Phone section then click the Add another item button and an additional Phone field will show up.

You can also reorder the numbers by clicking on and dragging the crosshairs to the left of the phone numbers.

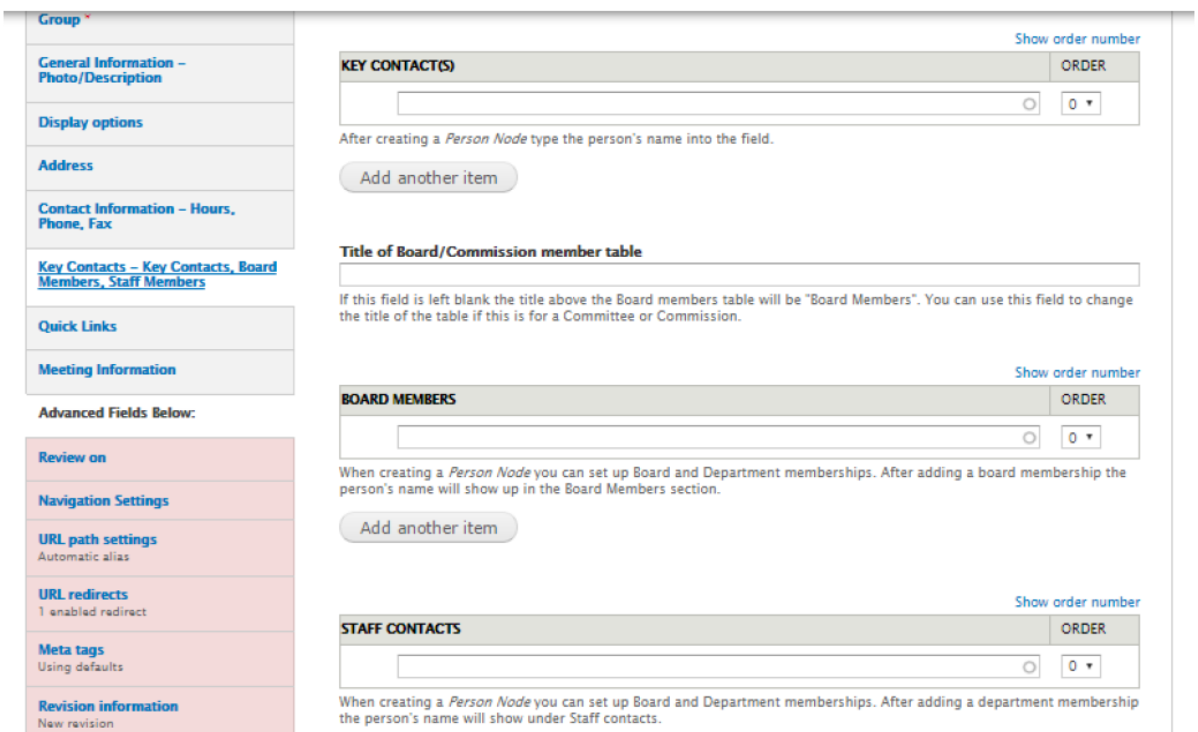


If you click on Show order number, you will see a view with a column labeled Order. From the dropdowns in this column, you can also arrange order of phone numbers.



The Emergency Numbers and After Hours Phone Number fields both work the same way.

Key Contacts - Key Contacts, Board Members, Staff Members Tab



Key Contact(s) - The User is to create each Person Profile prior to this page being populated. Once Person Profiles are created, they can be assigned on this page as Key Contact(s), Board Member and Staff Contacts. In each of these fields, begin typing the Person's name and if they have previously been created, their names will populate these fields.

*** Please Note: "Person Profiles" and this "Key Contact(s)" feature are not used by all websites. Please call Customer Support if you have any questions. ***

Meeting Information Tab - Mostly used for Boards to provide details for a regularly scheduled meeting.

When - Enter weekday of the meeting or something like "First Tuesday of the Month"

Where - Enter location of meeting

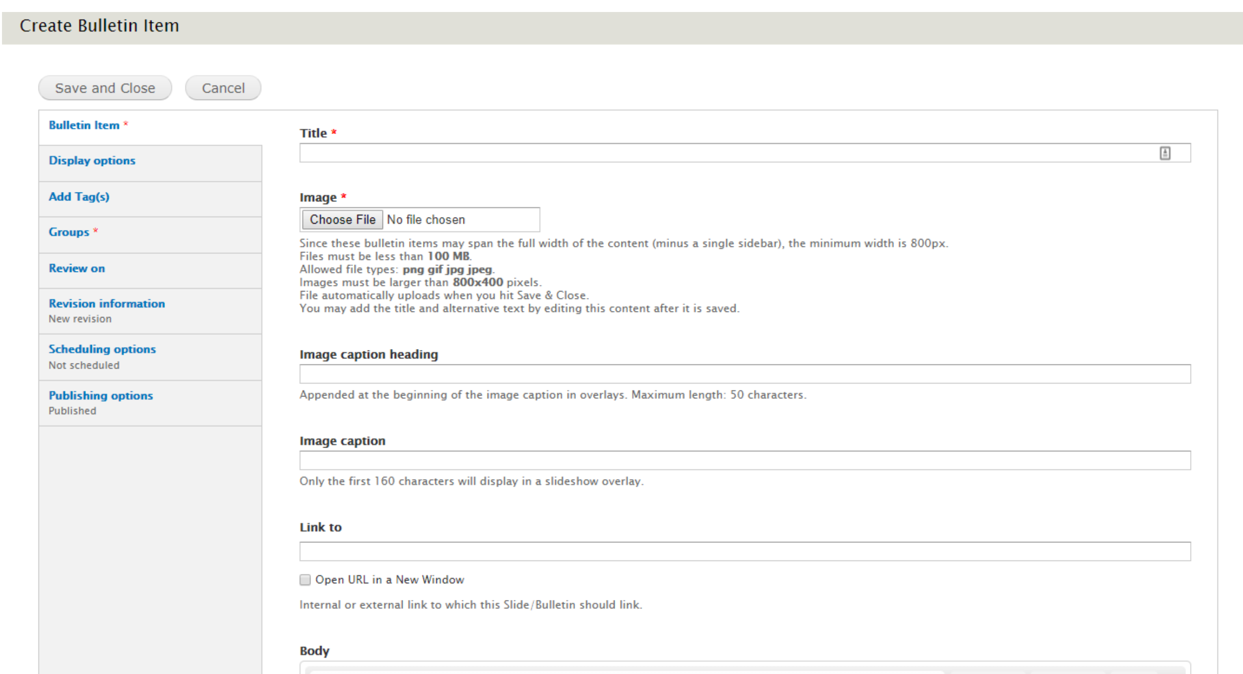
Time - Enter the time of meeting

7.0 Creating Website Items using Create Content pane

To access the Create Content pane, go to the homepage of your Group (Department or Board). This can be done either by using the website navigation or clicking my Account on the bottom of the page, then click on the Group link you would like to edit. Using the My Account link at the bottom of the page displays only those Groups that you have permission to update.

The screen that displays will have a Create Content link in the left-hand side of the webpage. Click and the Create functions will display to create content for your respective Group (Department or Board). *Content added via Create Content pane can easily be found in List View in that Group's Cabinet.*

8.0 Bulletin Item



*Title - Enter text that will be displayed at the top of the page when people click on the bulletin for more detailed information.

***Image** - Click **Choose File**, select the bulletin board image, then click **Upload.** Internet Explorer and FireFox browser has a **Browse** versus **Choose File** button.

**** Required fields***

Image caption heading - Text entered will be appended to the beginning of the image caption in overlays. Minimum length is 50 characters.

Image caption - Only the first 160 characters will display in a slideshow overlay.

Note: Can use only one of the following options - Link To or Body option

Link to - Enter the URL if you want to link to an internal or external webpage when someone clicks on this Slide/Bulletin. Check the "Open URL in a new window" box if the link should open in a new window.

Body - Free-form area where you type or paste the text that will be displayed on a webpage when someone clicks on a bulletin *(functions similar to Microsoft Word or the message section for email).* Free-form content will display underneath the Bulletin image when Bulletin is clicked upon. **See Section 20 for more detail about Free-Form**

Bulletin Example:

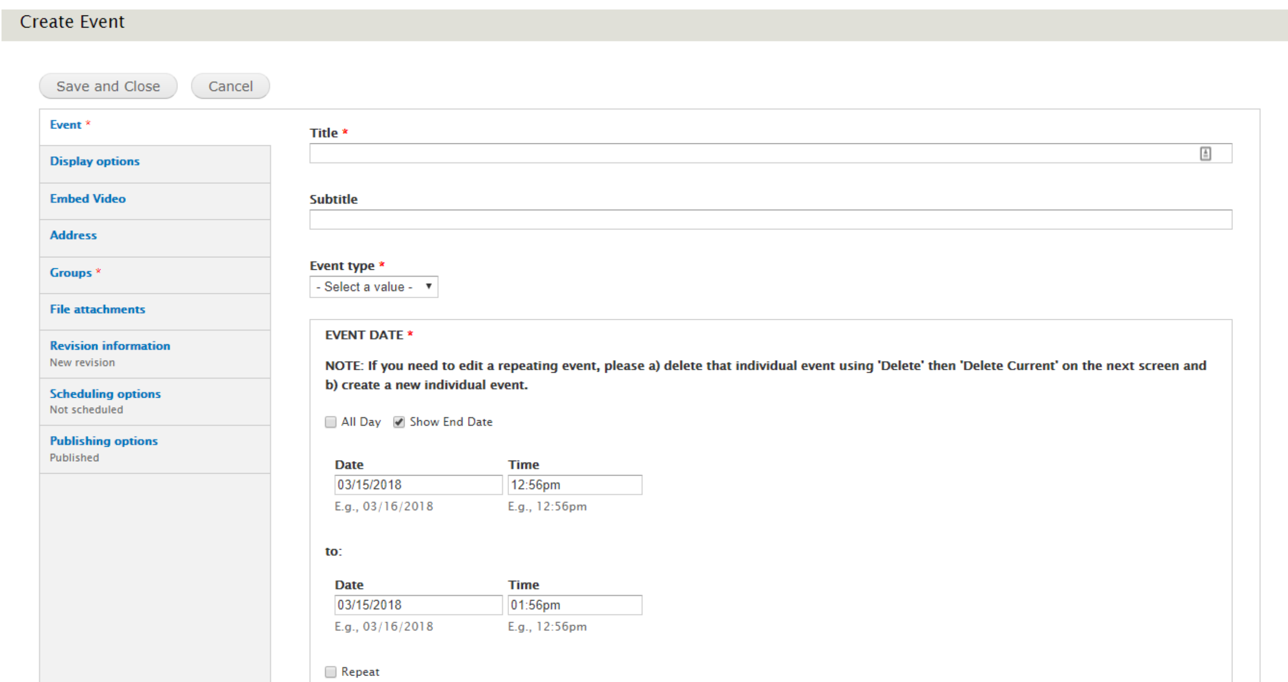
Note: The system will automatically resize it to make sure the image is not too large but the minimum image size to be uploaded is 800 pixels wide and 400 pixels in height. It is better to create the images at the appropriate size because if the system resizes the images it could distort any text on them. If you have any sizing issues or questions, contact our Customer Support Center.

Review on Tab - Group Admin can click within the date box and a calendar will display to select the month, day and year to review the content. An email will be sent to the Group Admin email address with a review reminder.

Scheduling options Tab - This feature allows a Group Admin to choose Publish and Unpublish dates for Bulletin Notices. For both Publish on and Unpublish on fields choose Dates and Times for displaying notices. If the Publish on date is blank it will be published immediately. If the Unpublish on date is blank it will remain published on the website until manually removed.

9.0 Event

Create Event(s)



***Title** - Enter text that will be displayed at the top of the page when people click on the Event for more detailed information.

***Event Type** - Select the type of event from the drop down menu. The default options to choose from are Community Event, Event, Holiday, and Public Meeting.

***Event Date**

Show End Date check box
Event Date Event Time To Event Date Event Time

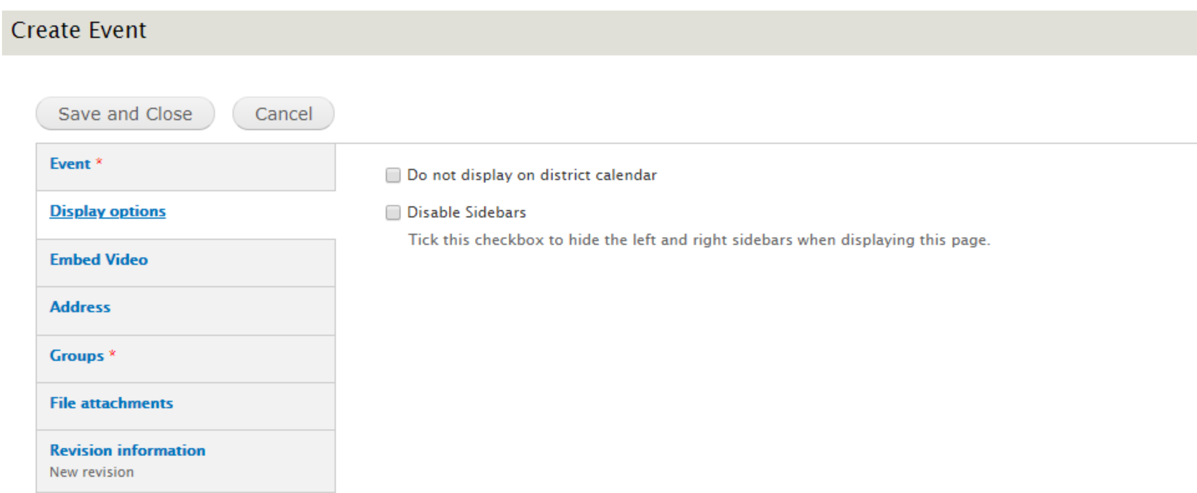
Optional Repeat check box for reoccurring events

If Repeat checkbox is checked off, Repeat section will automatically appear; with dropdown options and fields to complete based on how often Event is scheduled to Repeat.

**** Required fields***

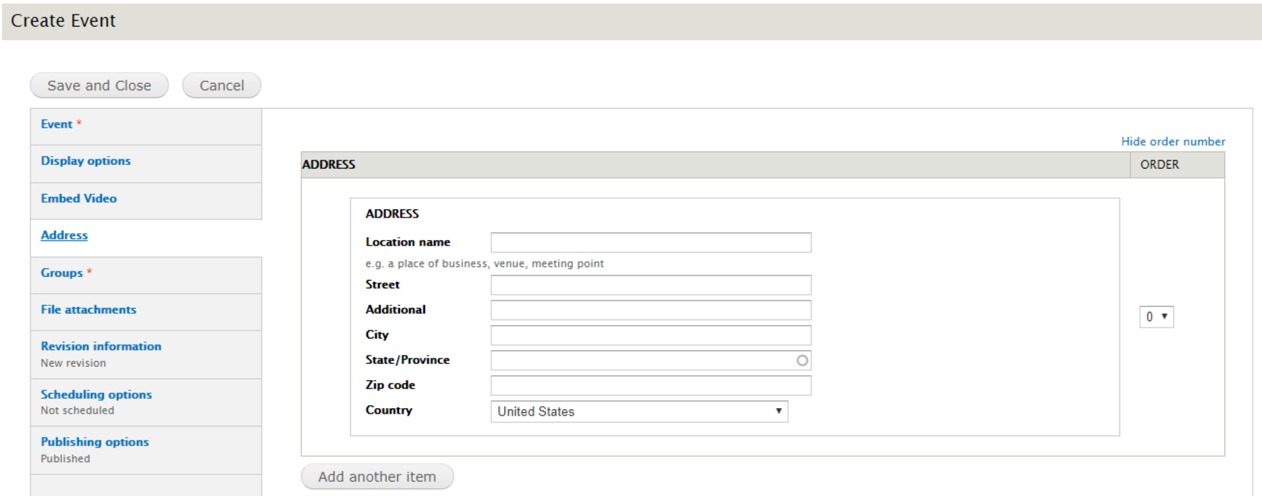
Body - Free-form area where you type or paste the Event details information that will be displayed on a webpage when someone clicks on an event *(functions similar to Microsoft Word or the message section for email).*

Display Options



Check the box "Do not display on district calendar" if you do not want this Event to appear on the District calendar. If checked, the Event will only appear on the calendar for this Group (Department or Board), which may also serve as the School Calendar.

Address

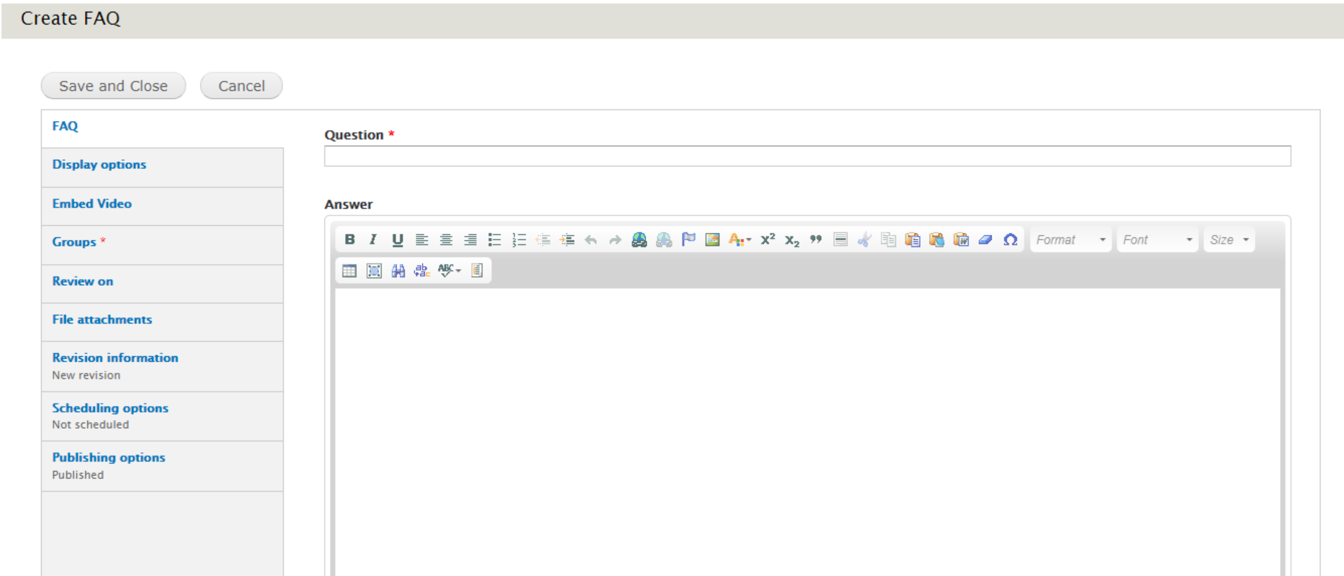


Location name of event - Label like "High School" or "Middle School Gym"

All other fields are standard address fields and display in the order seen. *Please be as specific as possible when entering address, Google Maps automatically creates a location link.* Click Save upon completion of fields.

File Attachments - To attach file(s) to an event.

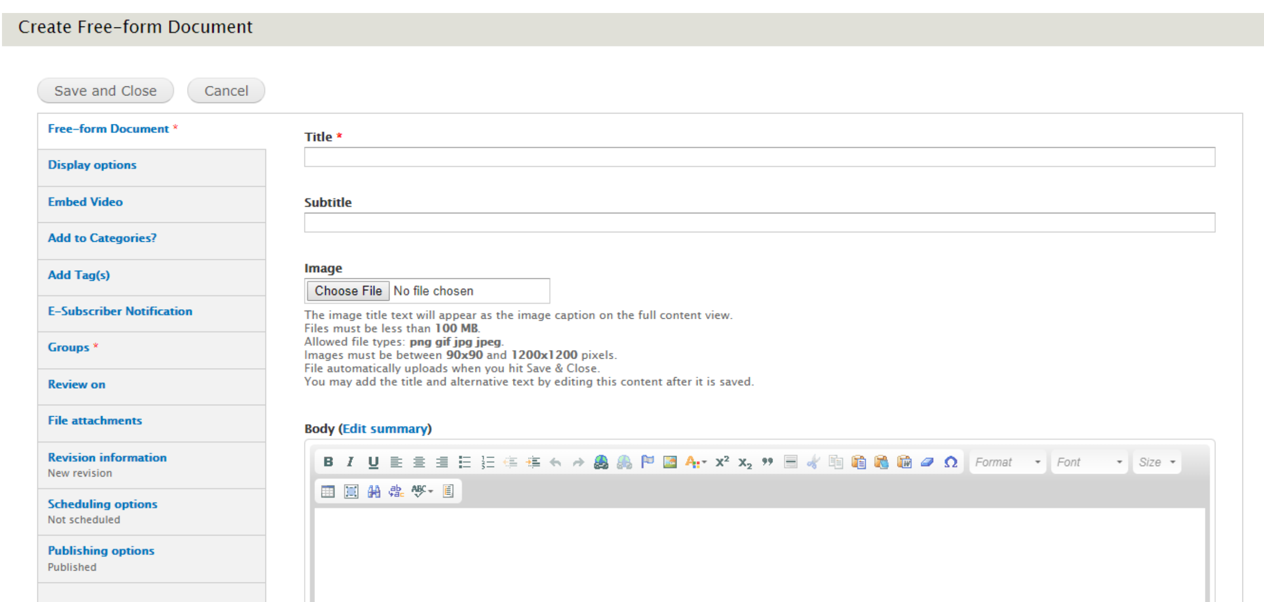
10. FAQ



Question - Enter the question

Answer - Free-form area is where you type or paste the answer to the question. Function is similar to Microsoft Word or the message section for email. FAQ's must be created one FAQ at a time.

11. Free-Form Document



Title - Enter the title of the page that will show up at the top of the content area of the webpage.

Body - Section where text, images, tables can be added. The **Body** section is the free-form area and functions similar to Microsoft Word or the message section for email. **See Section 20 for more detail about Free-Form**

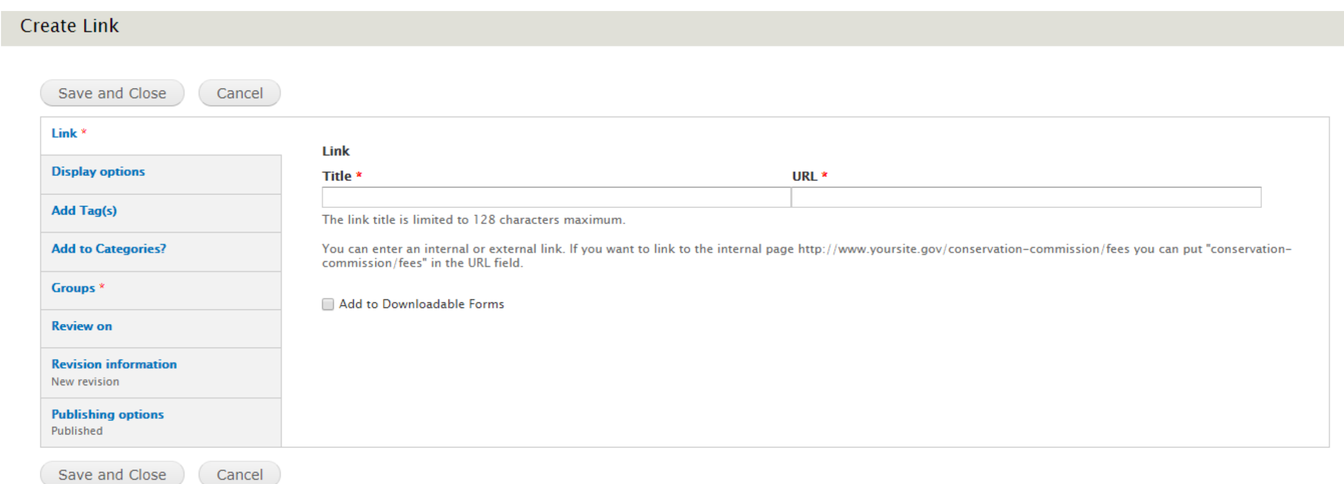
__Display Options Tab__

Add to persistent links - When this box is checked it adds a link to the webpage of the Group (Department or Board) left navigation. If the box is unchecked, it won't display in the left navigation as a persistent link *but it will still be archived in the Cabinet.*

Open URL in a New Window - Place a check in this box if you want to open this webpage into a new tab on your browser.

Display on "Where Do I Go For?" page - If checked, this page will show up on the "Where do I go for" *(also known as Service A-Z, How Do I, Find It Fast)* page.

12. Link



Link Title is title of the link that will be displayed to your Group (Department or Board) navigation.

Link URL - This can either be a link to an external page like a state or government site, or for a page in a different Group.

- Internal page, use this format – **brookfield-high-school/world-languages**
- External page, use the full URL address - **http://www.doe.mass.edu/educators**

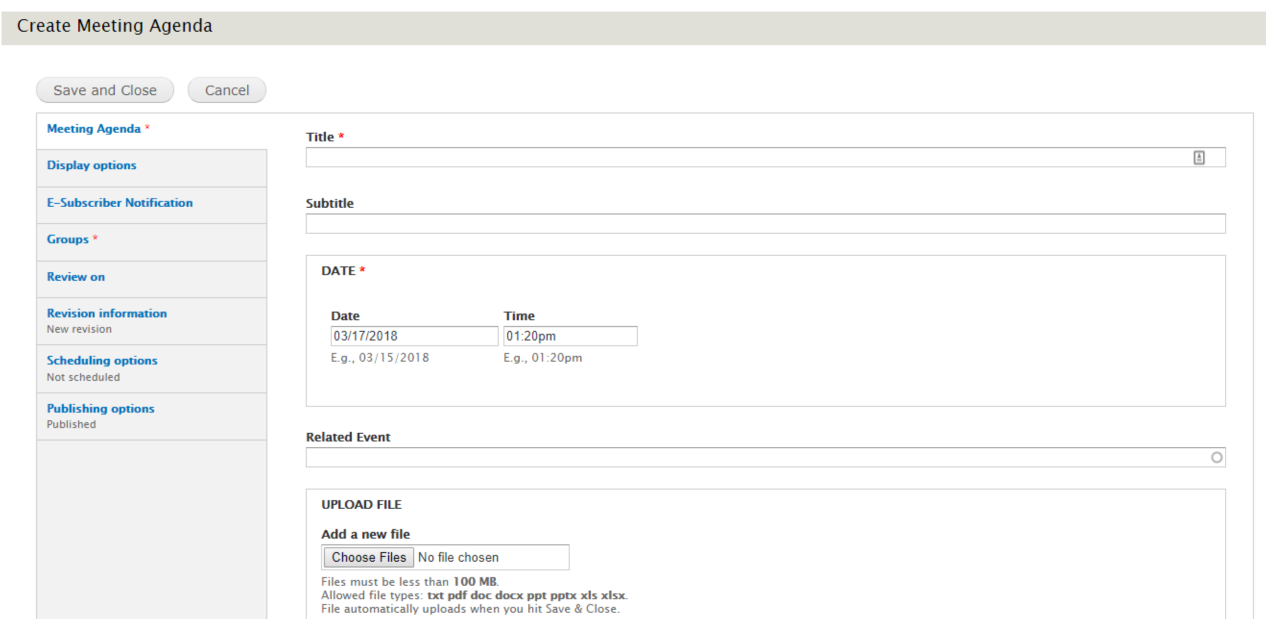
<u>Display Options Tab</u>

Add to persistent links - When this box is checked it adds a link to the webpage of the Group (Department / Board) left navigation. If the box is unchecked, it won't display in the left navigation as a persistent link but it will be archived in the Cabinet.

Open URL in a New Window - Place a check in this box if you want to open this webpage into a new tab on your browser.

Display on "Where Do I Go For?" page - If checked, this page will show up on the "Where do I go for?" *(also known as Service A-Z, How Do I, Find It Fast)* page.

13. Meeting Agenda



Title - Enter text *(e.g. Agenda)* that will display in the listing of all Meeting Agendas for your Group.

Subtitle - Add subtitle to your Agenda

Date - Place the date and time of the meeting.

Related Event - If you start typing in the name of an event created on the calendar it will show you a list of potential matches. *(Note: Your upcoming Event has to first be created before you can link your Agenda to it).*

Once you select an upcoming event this agenda will display on that event in the calendar. *(Note: The more you type into the Related Event field the easier it is to find the correct event. It starts searching from the start of the event name so if your event is called "School Committee Meeting" you would want to start typing "School Comm" instead of "Meeting". We also recommend using descriptive names for your events so it is easier to find when creating agendas).*

UPLOAD FILE - Upload a PDF of your Meeting Agenda by clicking the **Choose File** button and select the file, then click **Upload**. Internet Explorer browser has a **Browse** versus **Choose File** button.

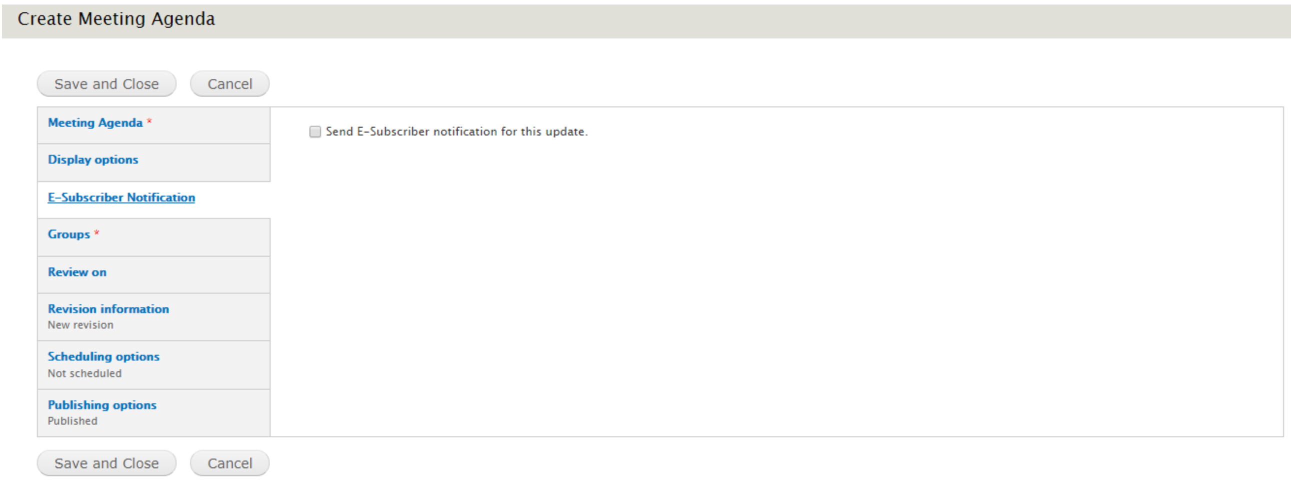
Launch uploaded file without description page check box option. If this box is un-checked no description page will be displayed and clicking the Agenda link will just open the uploaded file. If box is checked a description page will display showing a date and time when the agenda was submitted, a link to the agenda pdf and the date for the meeting associated with the agenda. It will also display any information you have entered into the Body *(section to be discussed).*

Body - Section where text, images, tables can be added. The **Body** section is the free-form area and functions similar to Microsoft Word or the message section for email. **See Section 20 for more detail about Free-Form.**

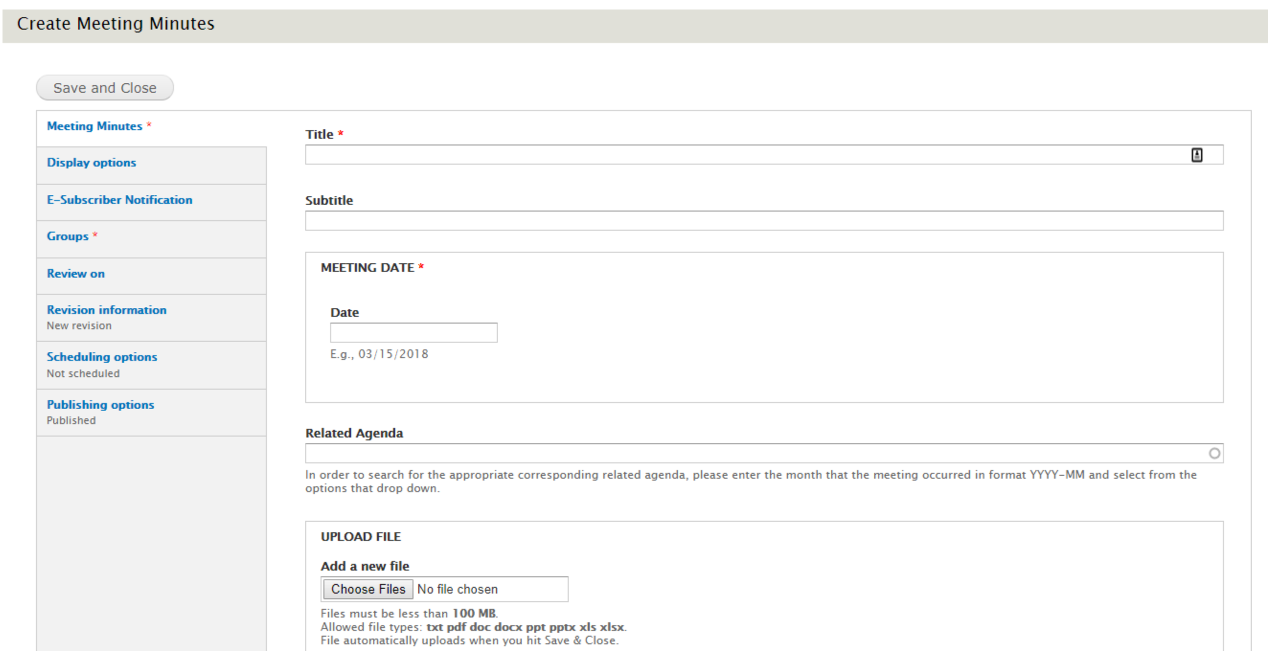
E-Subscriber Notification Tab

Send E-Subscriber notification for this update. If your Group (Department or Board) is set up so that people can subscribe to a new posting, then you can send the notification by placing a check in the box then click the Save and Close button to send email.

If you forget to check off this checkbox, e-subscribers will not get an email notification.



15. Meeting Minutes



Title - Enter text *(e.g. Minutes)* that will display in the listing of all Meeting Minutes for your Group.

Subtitle - Additional information can be entered as a subtitle.

Meeting Date - Place the date

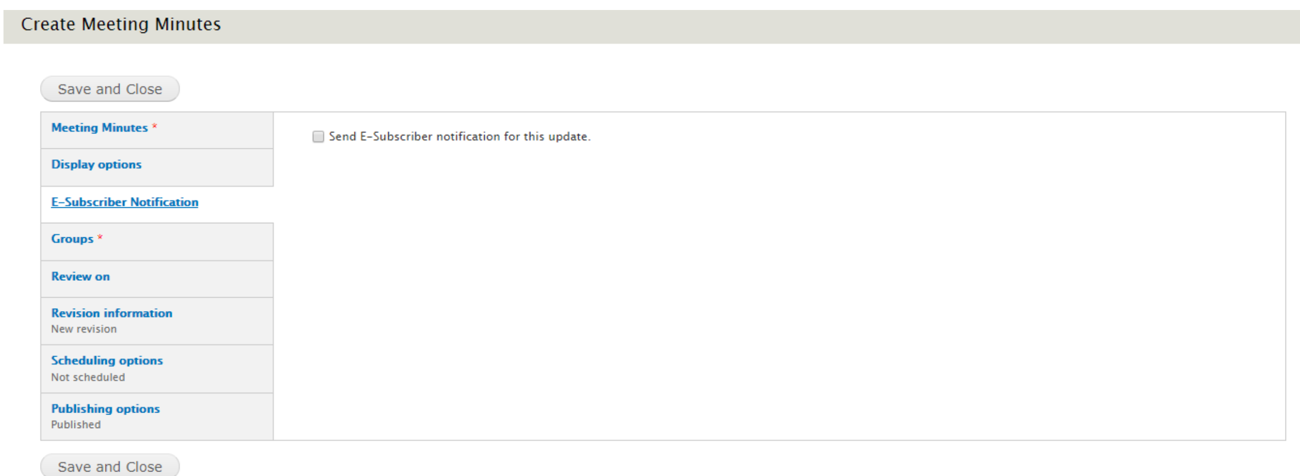
Upload File - Upload a PDF of your Meeting Minutes by clicking the **Choose File** button and select the file, click **Upload**. Internet Explorer browser has a **Browse** versus **Choose File** button.

Body - Section where text, images, tables can be added. The **Body** section is the free-form area and functions similar to Microsoft Word or the message section for email. **See Section 20 for more detail about Free-Form.**

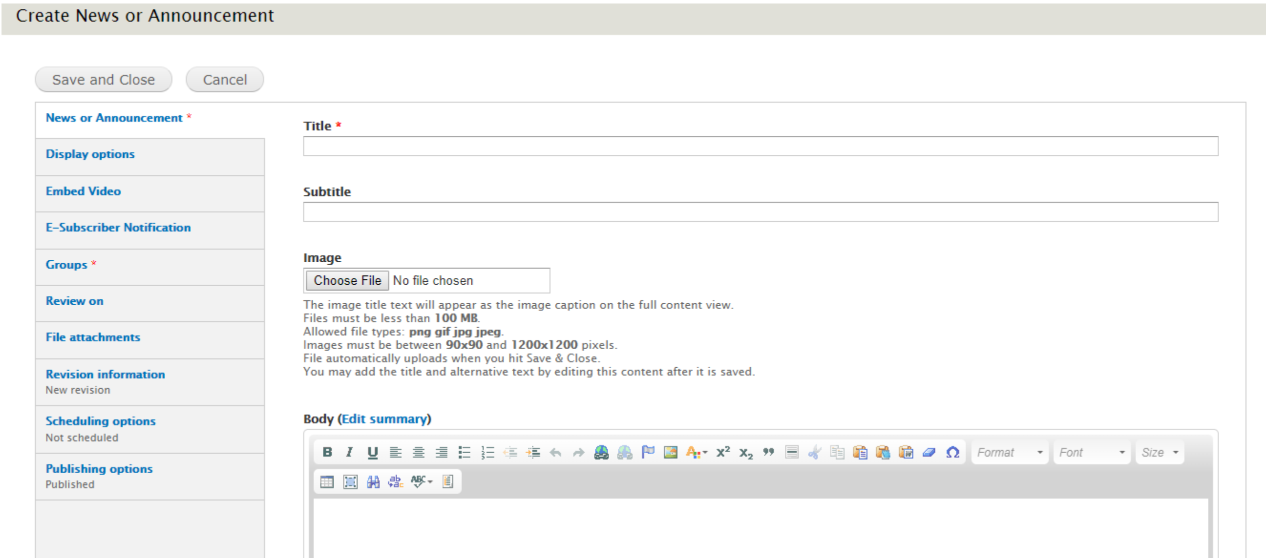
E-Subscriber Notification Tab

Send E-Subscriber notification for this update. If your Group (Department or Board) is set up so that people can subscribe to a new posting then you can send the notification by placing a check in the box then click the Save and Close button to send email.

If you forget to check off this checkbox, e-subscribers will not get an email notification.



16. News or Announcement



Title - Enter text that will display at the top of the news item. It will also be used in the listing of news items on your Group.

Subtitle - Enter text that will display under the title of the news item.

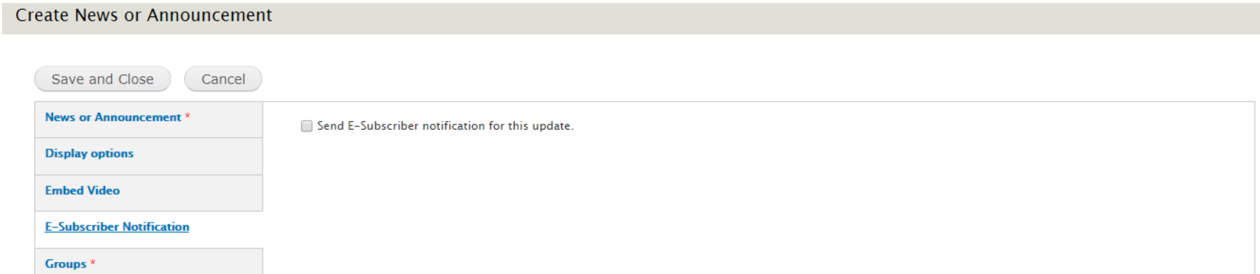
Image - Upload image to your news item. When an image has been uploaded a Title box will display allowing administrators to enter an image caption.

Body Text - Free-form area where you type or paste the news information that will be displayed when someone clicks on the link to view the new article *(functions similar to Microsoft Word or the message section for email).* **See Section 20 for more detail about Free-Form**

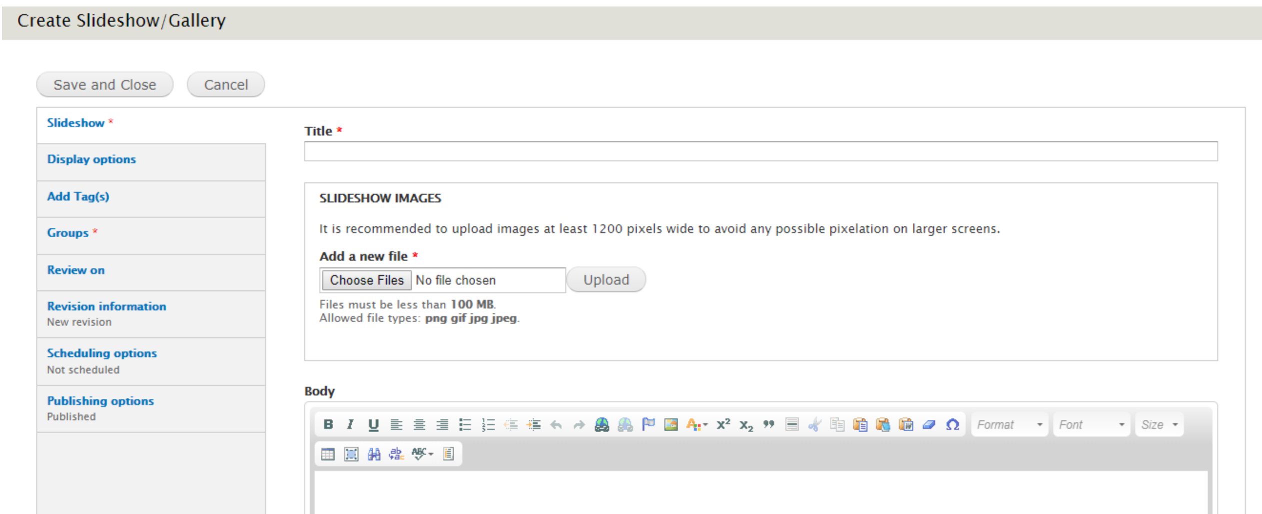
<u>**E-Subscriber Notification Tab**</u>

Send E-Subscriber notification for this update. If your Group (Department or Board) is set up so that people can subscribe to a new posting, then you can send the notification by placing a check in the box then click the Save and Close button to send email.

If you forget to check off this checkbox, e-subscribers will not get an email notification.



17. Slideshow/ Gallery



Title - Enter a title that will display at the top of the slideshow page.

Slideshow Images - Click **Choose Files** button, select an image file and then click **Upload**. Click the **Add another item** button will let you add more images. Internet Explorer browser has a **Browse** versus **Choose File** button.

- After uploading an image you will be *required add **Alternate Text,*** and **Title** text *(Captions)* for the images. Anything entered as title text will display under the image as it rotates.

Image Uploading Guidelines - Title text will be displayed as caption for each image. Since these images can be used to span full width of the site, the minimum image width is 1200px.

Body Text - Section where text, images, tables can be added. The **Body** section is the free-form area and functions similar to Microsoft Word or the message section for email. **See Section 20 for more detail about Free-Form.**

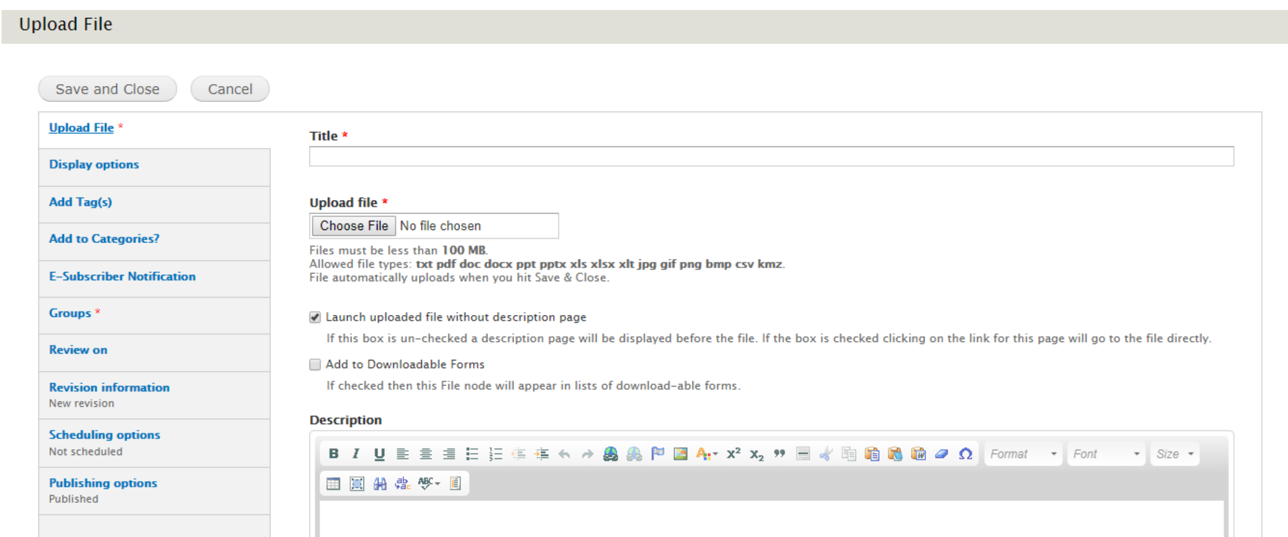
<u>**Display Options Tab**</u>

Add to persistent links - When this box is checked it adds a link to the webpage of the Group (Department or Board) left navigation. If the box is unchecked, it won't display in the left navigation as a persistent link, but will be archived in the Cabinet.

Open URL in a New Window - Place a check in this box if you want to open this webpage into a new tab on your browser.

Hide Next and Back controls - If checked will hide the Next and Back buttons displayed under images.

18. Upload File



Title - Enter text to reflect what information is in the file you will be uploading.

Upload File - Click **Choose File**, select the file then click **Upload.** Internet Explorer browser has a **Browse** versus **Choose File** button.

- Allowed file types are: txt, pdf, doc, docx, ppt, pptx, xls, xlsx, xlt, jpg, gif, png, bmp, tiff and csv, they must be less than 50 MB.

Description - Section where text, images, tables can be added. The **Body** section is the free-form area and functions similar to Microsoft Word or the message section for email. **See Section 20 for more detail about Free-Form.**

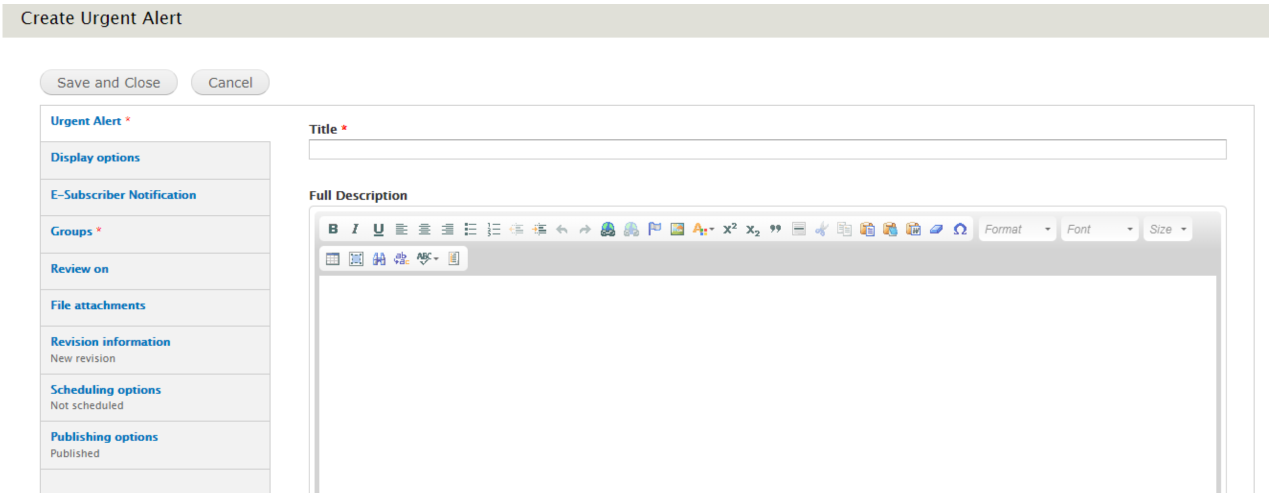
Display Options Tab

Add to persistent links - When this box is checked it adds a link to the webpage of the Group (Department or Board) left navigation. If the box is unchecked, it won't display in the left navigation as a persistent link, but will be archived in the Cabinet.

Open URL in a New Window - Place a check in this box if you want to open this webpage into a new tab on your browser.

Display on "Where Do I Go For?" page - If checked, this page will show up on the "Where do I go for?"*(also known as Service A-Z, How Do I)* page.

19. Urgent Alert



Title - Enter a title that will display on the Urgent Alert.

Full Description is linked from the Urgent Alert with detail. This section is where text, images, tables can be added. This section is the free-form area and functions similar to Microsoft Word or the message section for email. **See Section 20 for more detail about Free-Form.**

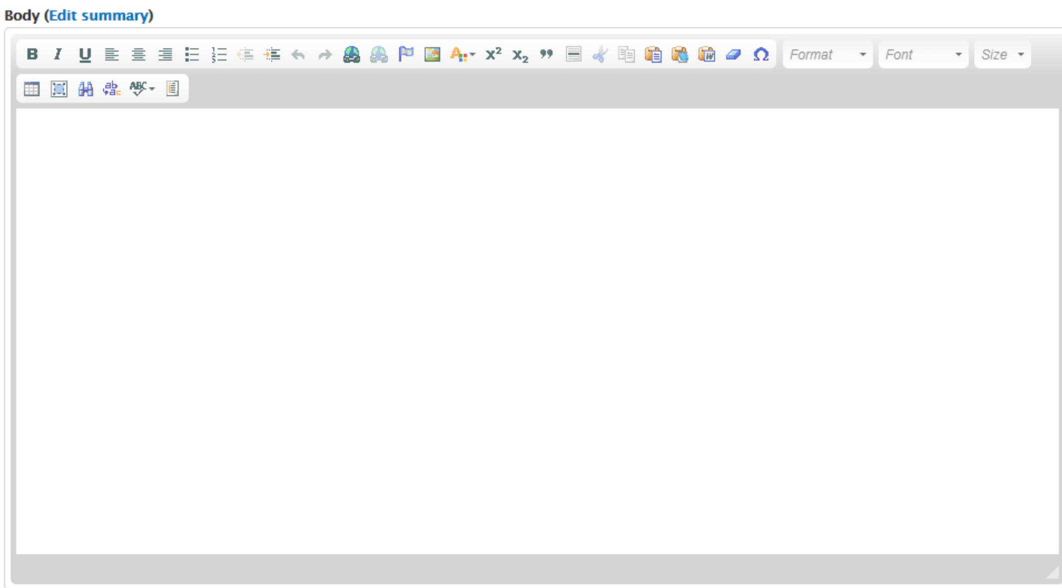
<u>**E-Subscriber Notification Tab**</u>

Send E-Subscriber notification for this update. If your Group (Department or Board) is set up so that people can subscribe to a new posting then you can send the notification by placing a check in the box then click the Save and Close button to send email. *If you forget to check off this checkbox, e-subscribers will not get an email notification.*

Scheduling options Tab - This feature allows a Group Admin to choose Publish and Unpublish dates for Urgent Alerts. For both Publish on and Unpublish on fields choose Dates and Times for displaying notices. If the Publish on date is blank it will be published immediately. If the Unpublish on date is blank it will remain published on the website until manually removed.

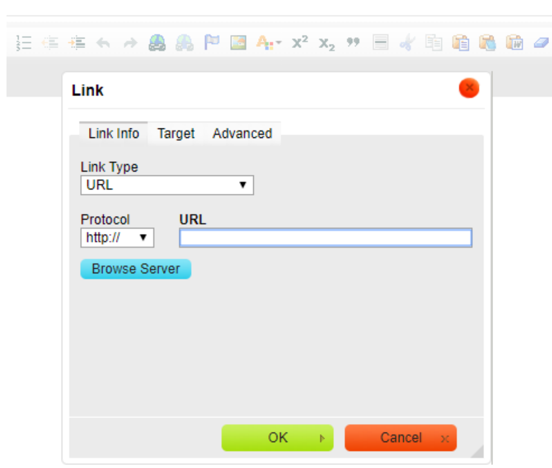
20. Free-Form Area / WYSIWIG / MS Word like area

Free form area is available on many of the CMS web forms and allows for adding or pasting of text, along with the inserting of images and tables. This area functions very similar to Microsoft Word or the message section for email. It is referenced on the web forms by the following names including Description, Body, Answer, Body Text, and Full Description.



 - Use these buttons when pasting Plain Text or Text from MS Word, MS Excel

 - Click this button when creating a link and the following window will appear. Remember you must first highlight the text or click on the image you want to make into a link, and then click the Link button. Past the URL into the URL box and click OK.



 - Use these buttons to Bold, Italicize or Underline text

 - Click this button to insert an image. Then perform the following Click sequence to add the image to the Free-Form area. **Do Not Paste Images Directly Into The Free-Form Area**

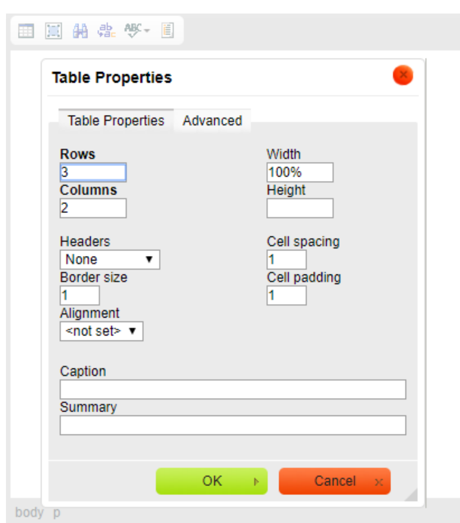
Click **Browse Server**
Click **Upload**
Click **Choose File** *(select the image)*
Click **Upload**
Click **Insert File**
Click **OK**

 - Click the first or second button to add bullets or numbers to text. The third and fourth button will indent or remove indentation of text.

 - Click these buttons to Left, Center or Right justify the text or image.

 - Click these buttons to Find or Replace text in the Free-Form area

 - Click this button to create a table. Enter the number of Rows and Columns for the desired table size. You may give the first row or column special styling under "Headers," and you can set the "Width" to 100% to ensure the table resizes itself on different screens.



21. Contact CivicCMS Customer Support

Customer Support is available for those individuals who have been given the authority to contact CivicCMS.

Hours: Monday to Friday, 9:00 am - 5:00 pm Eastern Standard Time

Customer Support Phone Number: 978-461-5895

Customer Support Email: support@vt-s.net