City of Tacoma
Web Steward User Guide

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ABOUT THIS GUIDE

This user guide has been designed to help the City of Tacoma web stewards navigate through the Content Management System (CMS). The following chapters are divided into individual modules and contain important information in the form of *Reminders*, *Tips, Notes* and *Pitfalls*. Pay attention to these alerts as they can prevent you from making common mistakes.

I.   Who Should Use this Guide

This guide will be used by web stewards who are responsible for managing or creating some or all pages of the City of Tacoma's site.

II.   About SitePublish

SitePublish is the software for our Content Management System. This system offers the web stewards and our web users all the tools needed to create, edit and maintain content on cityoftacoma.org.

III.   Accessing your Pages

In order to use *SitePublish*, you must first log into the system. The login page will contain fields for username and password. The location of the login link is available through the asterisk (*) located the bottom of every page on our website or by this link https://www.cityoftacoma.org/gateway/Login.aspx.

Vital Information

After logging in, you will be taken back to the homepage. Before continuing, there are a few things to keep in mind:

A. THE ADMINISTRATIVE TOOLBAR

After logging in, you will notice an Administrative Toolbar floating on the top of your page. This bar contains the tools you will need to maintain your website; it is specific to your user permissions and the page you are viewing.

B. PERMISSIONS

Some of the tools mentioned in this guide may not be available on your screen. This is due to the permission settings applied to the page you are viewing. If you are not web steward, and you do not see the toolbar, you do not have permission o edit that web page.

C. UNDERSTANDING PAGE TYPES

Throughout this manual, we will keep returning to the concept of page types. A *Page Type* in *SitePublish* refers to a specific web page with a specific module embedded in it, i.e. the Calendar Page Type will add a page with a calendar embedded in it to your web page. We will go into greater detail on adding page types and modules in following chapters.

D. UNDERSTANDING PORTLETS

Portlets are another unique component of the system. A portlet is a web-part that divides a single web page into unique areas of content. For instance, in the corresponding picture, each red box refers to a specific portlet on the page. Web stewards can create multiple portlets on a page to show different information.
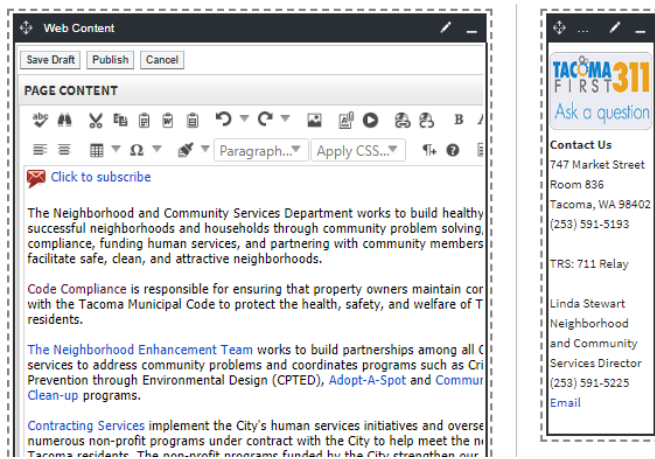
E. UNDERSTANDING HIERARCHIES: PARENT, SIBLING AND CHILD PAGES

Throughout this user guide you will come across terms such as **Parent Page**, **Sibling Page** and **Child Page**. Understanding these terms is an essential component when creating the subpage hierarchy of your site.

Parent Page: A page which precedes a particular subpage. For example, if all the form pages of a site were published under the HR page, the Parent Page for those form pages would be the HR page.

Sibling Page: A page that is available on the same hierarchical tier as your current page. Let's continue the example used in the Parent Page above. If all the form pages are listed under the HR page, then those form pages will be referenced as Sibling Pages to one another.

Child Page: A subpage published under your current page. Therefore, in this scenario, all the form pages will be considered Child Pages in reference to the HR page.
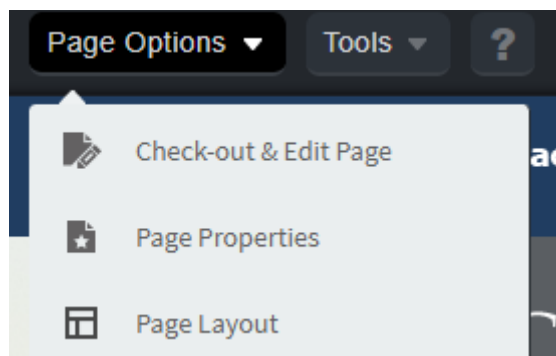
ADMINISTRATIVE TOOLBAR

The Administrative Toolbar contains a number of different components.
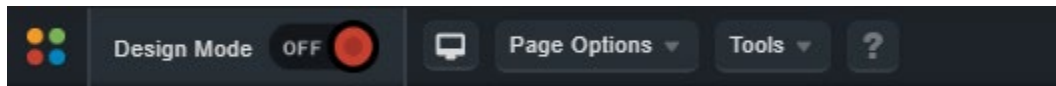
IV.   Editors

Some features highlighted in this section will only be available to Site Editors but not on all sites.

## V.   Editing Page Settings and Managing Pages

To access page settings, such as **Check-out & Edit Page**, **Page Layout**, hover over **Page Options** and choose the option you wish to use.

VI.   Getting Help

If you click on [?] in the menu, a new tab will open. Within this tab, you will find a list of user manuals as well as the option to contact Information Technology City of Tacoma support.

VII.   Updating Profile Information

On the right side of the toolbar, if you hover over the person icon you can change your **Account Settings** and **User Preferences**.
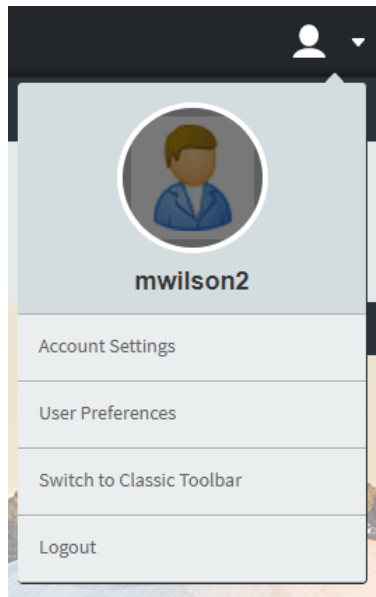
VIII. Switching to Design Mode

This option reveals the different portlets currently on your page. We briefly discussed portlets under the *Vital Information* section of this user manual. A portlet is a web-part that is used to divide an existing web page into different content areas. It is important to remember that not all portlets are content (or text) portlets. We will describe the different portlet types later in this manual.

There are several different types of portlets available. We will detail some of the most commonly used portlets in this manual.
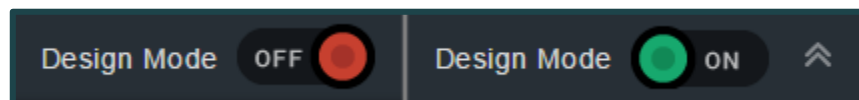

To edit portlets on an existing page, toggle the **Design Mode** option to on. When you switch to design mode, a dotted line will surround the editable regions on the page.
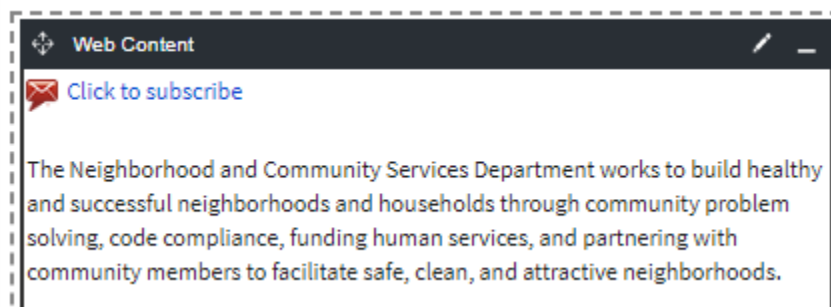
If you hover over a portlet, you will see editing options for that portlet. On the upper right corner of each portlet, you are given a number of options:

Edit: By clicking on the button of a content portlet, you have the ability to make any changes you could normally make by checking out and editing a page. You can also click **Edit** on most other types of

portlets to change the configuration settings or the content of that portlet. You can also edit content portlets by left-clicking the text of the portlet while in design mode.

History: By clicking the ✎ button of a portlet, you can change the version. This option is only available for portlets that have 🕐 version control.

Minimize: Clicking the ▬ button will minimize the portlet and hide it from view.

Maximize: Clicking the ▣ button will maximize the portlet.

A. ADDING PORTLETS TO A PAGE

When you switch to design mode, you will be presented with a new toolbar. This toolbar will allow you to access both the **Portlet Library** and the **Local Portlets** by clicking between the two tabs. You can then choose the Portlet Category by selecting it along the top. Click and drag the type of portlet you want to use in to the desired region on the page below. The page will refresh and your new portlet will be in place.
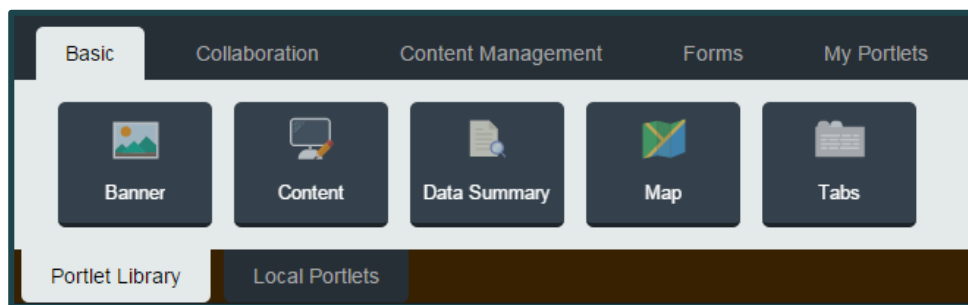

Note: While you can drag and drop portlets in to any region on your site, you cannot drag and drop portlets on to pageset (the area of the page where you generally see the side navigation). For pagesets, which can only be modified by Administrators, you will still use the **Add Portlet to Pageset** link and add portlets that way.

To move portlets within a web page, simply hover your mouse over the top left corner of the portlet, where the name is located. Your cursor will change too when you are in the correct spot. Then click and drag the portlet from its current location to wherever you would like to place it.

Adding Accordion Items

Step 1: To add an accordion item, simply drag over the Accordion Item (not accordion control) inside of the design menu under Basic portlets.
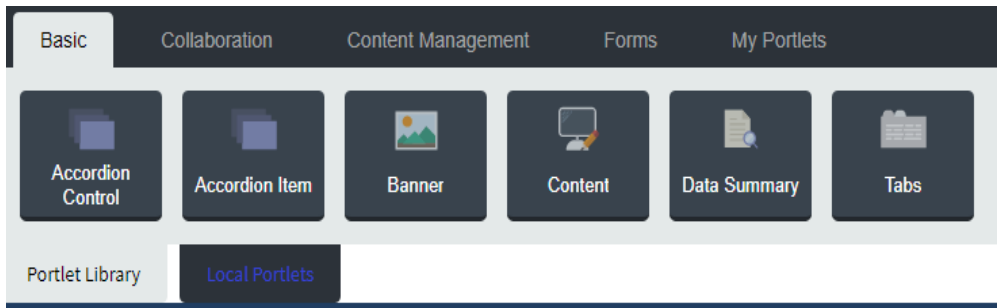
Step 2: Once the item has been dragged over, you will see text saying click to edit. Hover over the text.
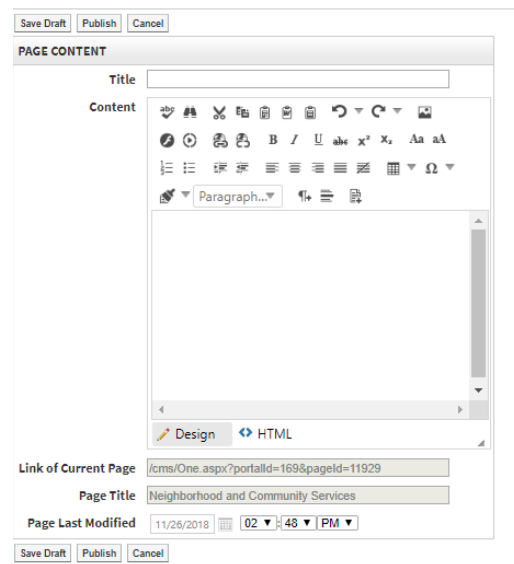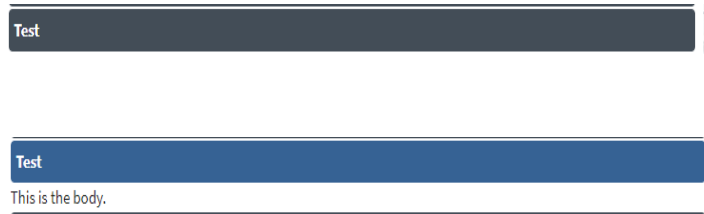

Step 3: Click the pencil icon up in the right hand corner next to the clock.

Step 4: This will bring up an editor window where you can enter information for your accordion.

Step 5: The title will be the accordion bar itself and the content will be what's inside of the accordion after you click it.

Step 6: Hit publish.

PAGE OPTIONS

The **Page Options** menu contains a series of system specific tools. These tools are the core of the City of Tacoma system and it is essential that users learn how to navigate through them in order to use the solution.

IX. Editing a Page

In order to edit the content of existing pages on your website you can use **Design Mode** and click **Edit** on the content portlet. Alternatively, you can click on **Check-out & Edit Page** under **Page Options**. You will be routed to another page that is divided into three main headings:

A. PAGE PROPERTIES

The **Page Properties** section allows you to change the title of a page on the website. Simply type in the new name of your page in the **Title** field and the system will automatically update the **Name** on the page.

B. PAGE CONTENT

The Page Content section contains the What You See Is What You Get (WYSIWYG) Editor. The buttons in this editor are similar to the buttons in Microsoft Word®.

C. HOW TO ADD A TABLE

1. Navigate to the page where you would like to add the table
2. Place your cursor where you would like to place the table
3. Click the down arrow on the table tool icon
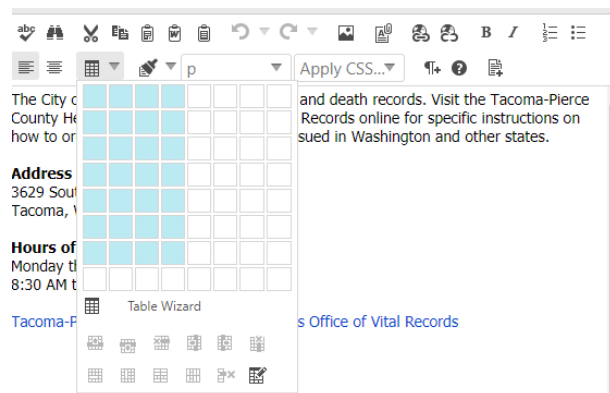
4. Click on table wizard in the dropdown box
5. A new popup box will appear
6. Under the table design tab use the green plus and red minus icons to add rows and columns
7. Each icon will add or remove the row or column above or to the right of the grey highlighted cell

8. Click the table properties tab at the top of the pop up box
9. Make sure the table height is blank. Enter either 70% or 100% for the width (Note: make sure not too forget the % sign.) Base this on the amount of content in your table
10. Set the CSS class layout to telerik-reTable-4
11. Uncheck first column, last row and last column
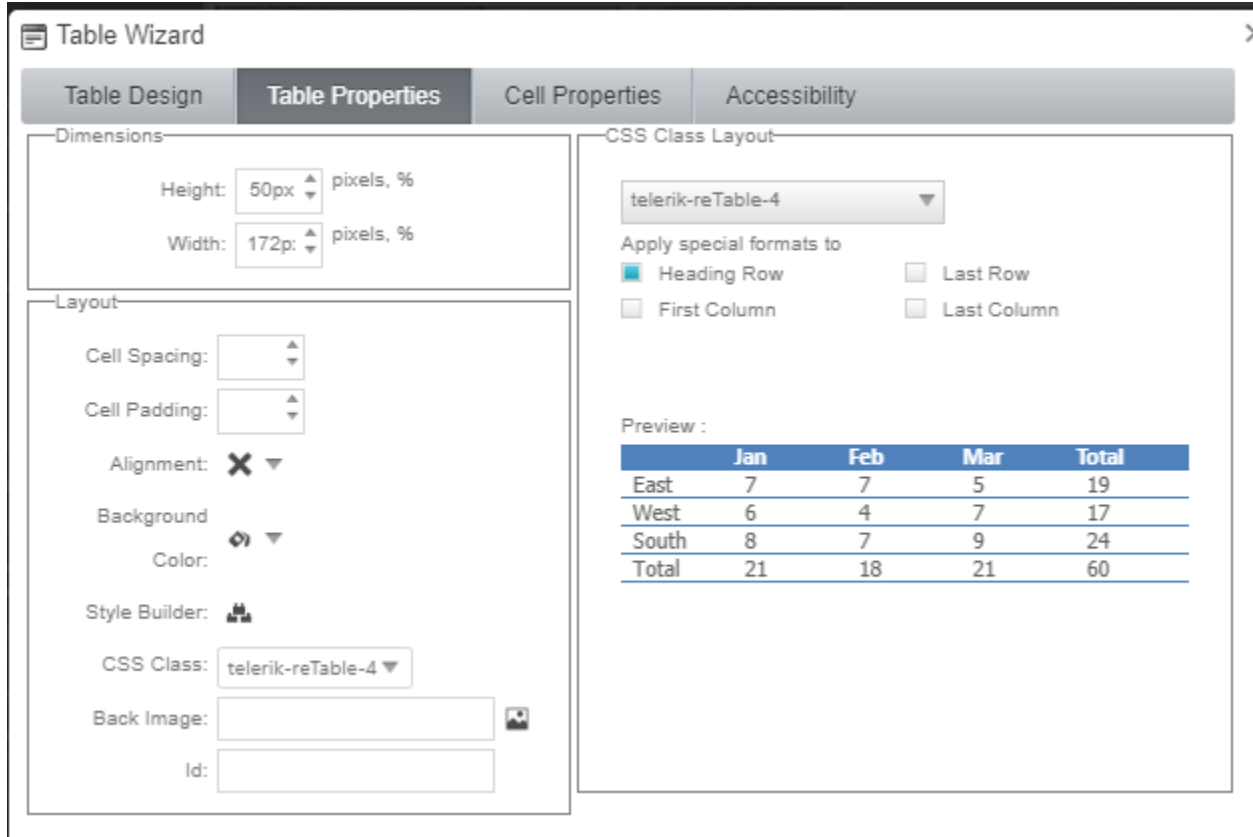
12. Click on the accessibility tab
13. Enter a brief summary for the table that describes what the table contains
14. Select associate cells with headers
15. Click ok
16. Enter your content for each cell
17. Make sure to remove the default space for each cell before entering content
18. Place your cursor in a blank cell and press **delete** or **backspace** to remove this blank space
19. Rows and columns can be added by right clicking on a table cell and selecting an option
20. A table's properties may be edited at any time by right clicking on a table and selecting table properties
21. Once done click publish

D. **PAGE ADMINISTRATION**

The **Page Administration** section contains user specific information on the page. This section is divided into 6 main components:

i. **Last Modified**

The **Last Modified** section displays when the page was last edited.

ii. **Release Schedule**

The **Release Date** and **Expiry Date** fields allow you to schedule when the page will be visible to users. The Release Date determines when the page will be made public and the Expiry Date determines when the page will no longer be public. By default, the Release Date will be set to **Now** and the Expiry Date will be set to **Never**. This is subject to Media and Communications Office approval.

iii. **Approval Notes**

Changes made by the web stewards, or page authors, are not made live on the site unless it is approved by the Media and Communications Office. Under the **Approval Notes** section, you can include notes on the changes made which will then be routed to the approver and expedite your page approval.

iv. **Publishing Your Page**

After editing your page using the WYSIWYG editor, you will have three options available to you: **Save Draft**, **Publish** and **Cancel**.

PUBLISHING YOUR PAGE	
Save	Clicking the **Save Draft** button saves all the changes made to your web page on City of Tacoma system but the changes will not yet appear (or be made live) to visitors of the page. This allows you to keep working on the page over multiple sessions and reveal the changes only when you are ready. Please make sure to save often, so that if you are away from the page for a while during edits the browser does not time out and erase your changes.
Publish	Clicking on **Publish** will send your page for approval immediately.
Cancel	Clicking on **Cancel** will discard all the changes.

X. Check-in Page

Pages are automatically checked in when you **Publish** your page or **Cancel**. Pages that are checked out will be locked to other authors of the page.

A page does not get checked in if you do not click **Publish** or **Cancel**, or if you navigate to a different page while still in the editor.

If your page is locked, please contact the person who is locking the page first, then if they do not respond please put in a T-Ticket for support.
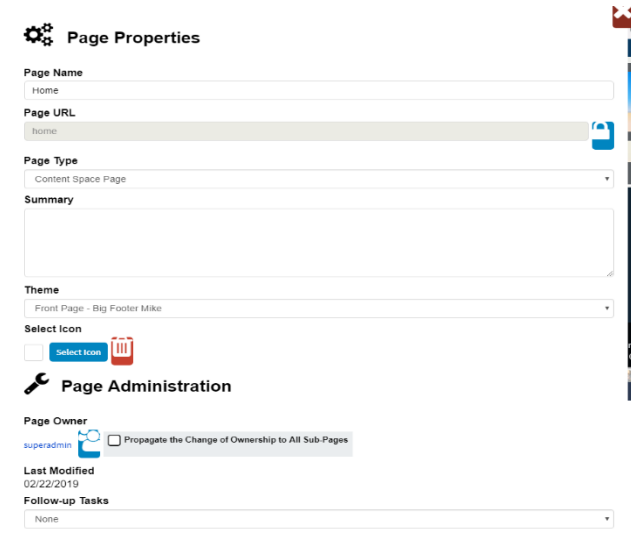
XI. Check-out & Edit Page

Pages that have been checked-in will be made available to other users through the **Check- out & Edit Page** option.
When you see this option, simply click on it to access the WYSIWYG editor.

Note: If you have not checked out the page already, you will see **Check-Out & Edit Page** as the menu option. If you have already checked out the page, you will see **Edit Page** as the menu option.

XII. Page Properties

The **Page Properties** section under the **Page Options** menu contains key information about the page you are viewing. This section is divided into two main headings: **Page Properties** and **Page Administration.**

A. PAGE PROPERTIES

This section is divided into six main headings:

i. Page Name
You can change the title of your web page by simply typing the new Page Name

ii. Name
This appears at the end of the URL for the page you are on. For example, if you were on the Contact Us page, the URL would end in contact_us. So your URL would be https://cityoftacoma.org/about/contact_us. This name will be in a format that is compatible with URLs as such special characters and spaces will be converted to underscores.

iii. Page Type
Displays the page type of the current page.

iv. Summary
A description of the web page. Please fill out the summary, this text is displayed after a search is performed to provide more information within the search results for the given page.

v. Page Theme
This determines the appearance of the page. Please do not change this setting as it is controlled and maintained by the administrators.

B. PAGE ADMINISTRATION

This component is similar to the *Page Administration* section we covered in the *Edit Page* section of this manual. The **Page Administration** section contains user specific information on the page. This section is divided into 4 main headings:

A. **Last Modified**

The **Last Modified** section informs a page owner on when that page was last edited.

B. **Release Schedule**

The **Release Date** and **Expiry Date** fields allow you to schedule when the page will be visible to users. The Release Date determines when the page will be made public and the Expiry Date determines when the page will no longer be public. By default, the Release Date will be set to **Now** and the Expiry Date will be set to **Never**.

XIII. Page Layout

In order to maintain a unified look and feel for cityoftacoma.org, there are two page layouts you can use. There is a one-column page or a two-column page that includes a right-hand sidebar.

⊡ Page Layout

Layout Style

Custom Layout

```
<template>
<div id="layout">
<div id="layout-left"><column order="1"/></div>
<div id="layout-right"><column order="2"/></div>
</div>
```

Validate HTML

A. PAGE LAYOUT: PORTLET TYPES

| Portlet Type	Description
By default when a user wishes to add a portlet to a page, they are given access to a wide range of portlets via the Portlet Library. If you do not see a portlet in the Portlet Library, check the Local Portlets area.	
Basic Category	

Content	A text portlet, where users can add content, videos, pictures, hyperlinks etc. Editing this portlet will take you to the WYSIWYG editor. If a link goes to an internal page please keep the link as target "None". If a link goes to an external page or any document, please set the target to "New Window". **To add link**: Type the link text. Highlight the link text. Click the hyperlink button in the editor toolbar. Link the URL by typing into the URL location. Set the target to: New window. Click OK. **To add an e mail:** Click the link button in the WYSIWYG editor. Goto the email tab. Fill out the form and click OK. **To upload images:** Click the image button in the WYSIWYG editor. Upload an image or select an existing image. Fill out the properties tab in the right pane. (Specifically alt text which is required for ADA). **To upload a video, submit a T-Ticket in with City of Tacoma IT support.**
Tabs	The tabs portlet works like a normal content portlet except you can add tabs. Each tab works as its own content area within the tabs portlet. You can also set the width of your tabs portlet to best suit its placement.

Forms Category

| There are additional options available such as the below. Please put in a <u>T-Ticket</u> with IT for assistance.	
Custom Form	This portlet allows you to insert a form portlet on the page and link it to one of the form templates.
Poll	This portlet allows you to place a question on the page and allow visitors to the page to vote on the answer. The results can be displayed on the page in bar or pie chart form.
Survey	This portlet allows you to create a series of questions for visitors to answer. Can include short answer, multiple choice, essay and other question types.

B. HOW TO ADD A PDF

1. Put the curser in the text where you want to insert the document.
2. Click on document manager.
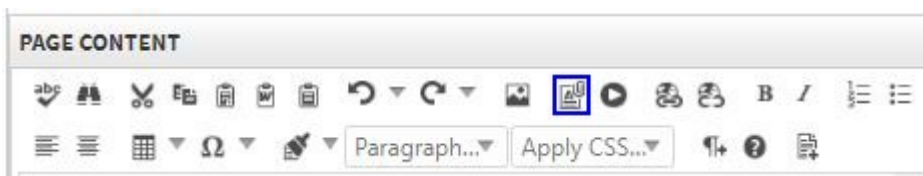
3. Select an existing file already uploaded in the system or press the "+Upload" button at the top of the window.
4. Set target to "New Window"
5. Add a tooltip for ADA
6. Change the link text.
7. Hit insert.

*If you are uploading a new file please **upload your document in the folder titled 'cms'**. It it is very important to only upload documents to the 'cms' folder and its subfolders. This filing structure is the same as it was in the CMS drive, so it should look familiar to you if you've previously uploaded documents. Once uploaded, just press the 'insert' button and your document is automatically added to your web page.
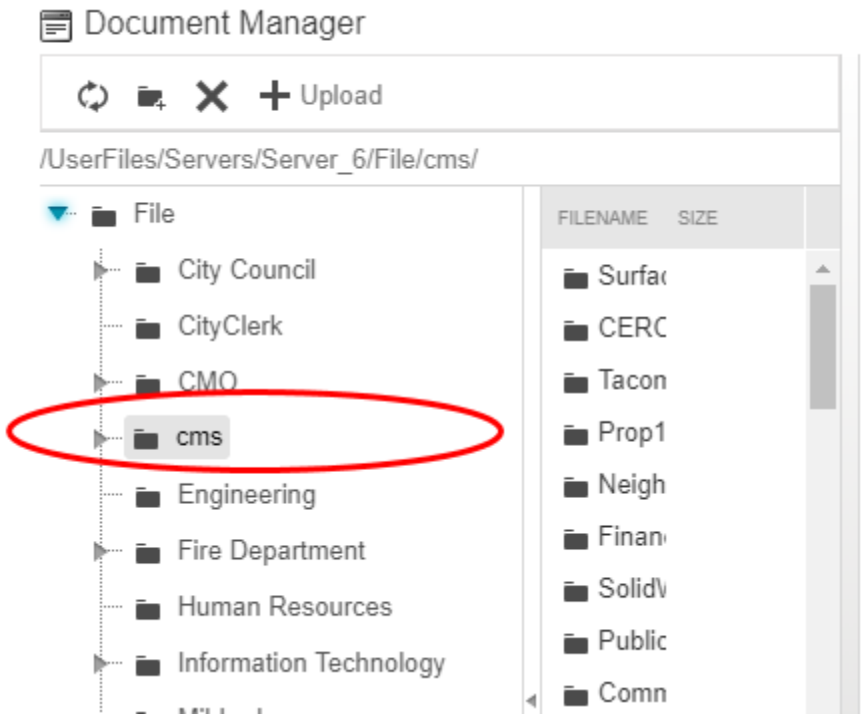
If you have any questions or technical issues when updating your cityoftacoma.org web pages, please reach out to the IT support desk via T-Ticket.