CROWN PEAK CONTENT MANAGEMENT SYSTEM TRAINING

User Guide

Virginia Department of Transportation
Public Affairs Division
Web Section

VDOT

CrownPeak™
MANAGE CONTENT NOT TECHNOLOGY

TABLE OF CONTENTS

INTRODUCTION

CrownPeak CMS is a software tool that allows users to manage Web site content easily and within a predetermined site design and structure. CrownPeak CMS puts Web content publishing into the hands of all users without the need for in depth understanding of Web site development.

User Guide versioning

The Web section is constantly looking for ways to improve user experience in the CMS and for this reason, menu labels and methods for performing tasks in the CMS might vary between the time this guide was written (September 12, 2007) and what you see when navigating in the CMS. For a complete list of updates to the CMS, please visit our CrownPeak training Web site at **http://cowwwdev1/cms_training/index.html**.

What you'll need to work in the CMS

- An Internet connection
- Internet Explorer 6 (IE6) or Internet Explorer 7 (IE7) Web browser
- The URL address of the CMS – **http://advantage8.crownpeak.com/vdot**
- An account – If you are a user of CONRAD you should already have an account set up and have received it from the Web section. If not, please see the contact information at the end of this document to request for a username and password. The default information for all new accounts are as follows:

Username: The first initial of your first name and your full last name (i.e., John Doe's username would be jdoe) in lowercase letters
Password: The password should be Pa$$w0rd (It is the word "Password" with dollar signs substituted for the letter "S" and a number zero substituted for the letter "o.")

How does it all work?

This process consists of three parts: the CMS, you the CMS user and the Web section. The CMS lets you put your content straight on to Virginiadot.org with the approval of a member of the Web section. After creating and/or gathering the information necessary for your page, log into the CMS, enter all your materials and submit the page for approval.

A member of the Web section will approve or reject your content. If approved, the content will be published live to Virginiadot.org. If rejected, the content is sent back so you may make the necessary changes to have it approved. That's it! Now you are ready to move on with your other tasks.

The CMS is:

- A content management system for the Web pages that create Virginiadot.org, including all supporting images and documents, overseen by the Web section in the Public Affairs Division.
- Accessible from anywhere with an Internet connec tion and Internet Explorer 6 or Internet Explorer 7.
- A tool that helps content creators enter content directly to Web pages and content editors to edit pages.

The CMS is NOT:

- FrontPage nor is affiliated with any Microsoft product.
- A communication system such as email or instant messenger
- Software to be downloaded or shared.
- A repository for images, documents and multimedia files.
- A testing environment for software, hardware, multi media or any other Web page or Web site than Virginiadot.org
- A photo library.

Logging In

By entering the URL above in IE6 or IE7 you should see the login screen (Figure 1).

In the "Username" field, enter the username you were given.

In the "Password" field, enter the password you were given. Don't worry about changing it right now. This will be covered in another section.

If this is your first time logging in, you will probably not know how to get around. The next section is a brief overview of the CMS's navigation system and how to get around it.

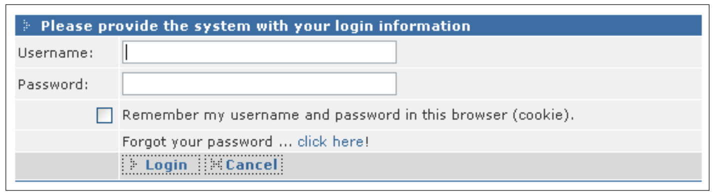


Figure 1 - CrownPeak CMS login screen.

NAVIGATION

Once in the CMS, there are two ways of getting around: the left-side navigation and the top navigation above the content.

Left-side navigation

The left-side navigation (Figure 2) acts as a global navigation throughout the site that contains ten links accessible from anywhere in the site with the exception of the preview pages, in which case you would use the top navigation.

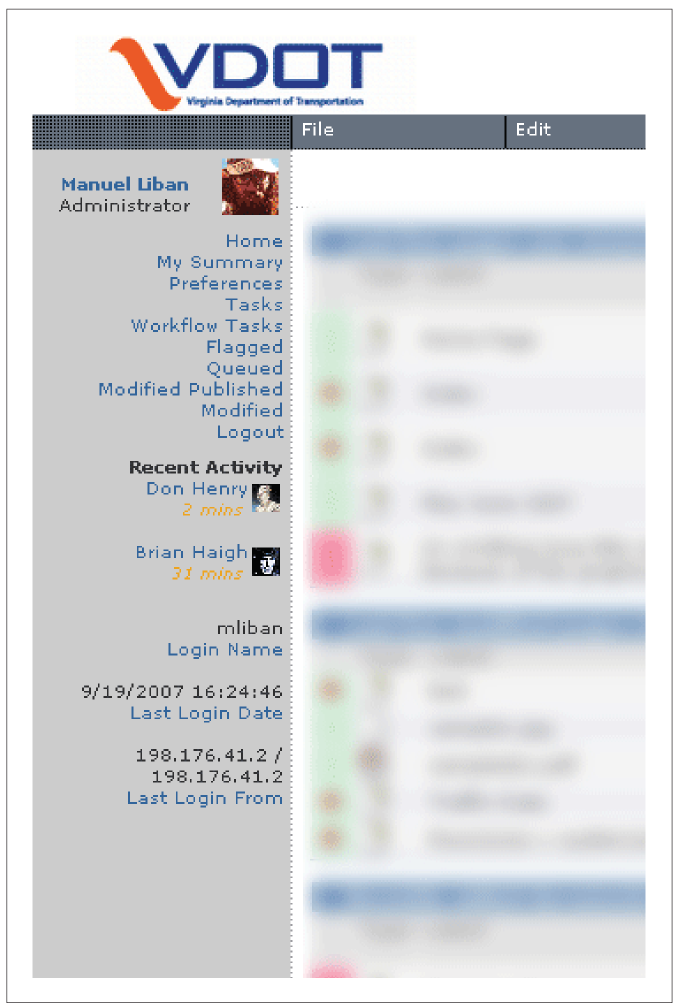


Figure 2 - CMS left-side navigation.

» Home takes you back to the page you first saw when you logged on. What appears on the home page will depend on the settings you save later on in your preferences.

» My Summary takes you a page that lists out the latest activity in the CMS, specifically the "Last five pages you viewed," the "Last five modified pages" and "Recently added documents". Also, if a user in the CMS locks any file it will appear on this screen as well.

» Preferences will give you the option to change the screen that will appear when you login and an option to change what page appears when you click on the "Home" link on the left-side navigation. There are other options on the "Preferences" page aside from the two mentioned above that should not be changed or altered in any way. There is a section dedicated to changing these settings in the "User Preferences and Settings."

» Tasks allow for any user to assign tasks to any other user in the CMS without using email. In the task as signment input box, there will be a drop-down menu list of all the possible users you can send a task to. By assigning a task to someone, it will send a mes sage to them containing the name of the person who sent them a task, level of importance when it was created, category, due date and any associated comments. All but the "Assign back to" field is optional.

» Workflow Tasks, Flagged, Queued, Modified Pub lished, and Modified will seldom be used, if at all. If the Web section finds it necessary to use any of these fields, the team will address the functionally and how to use these links on the training Web site. Click around these links to explore, but please do not alter any information that might be contained inside them.

» Logout allows you to logout of the system completely.

» Other information on the left side include: **Recent Activity** – This will contain three to four users depending on who is in the system. It will show their name the amount of minutes that have lapsed since their last action and their respective avatar images. **Your username, last login date** and **IP address** from where you last logged into the CMS.

Top Navigation

The Top navigation (Figure 3) changes relative to where you are on the site. If you're on the home page and hover over "File," it will show you options to navigate throughout the CMS.

If you were in a section of the Web site, say the "Info" section and drop down the "File" menu, it will give you the same options but also have new options to select from such as creating a new page.

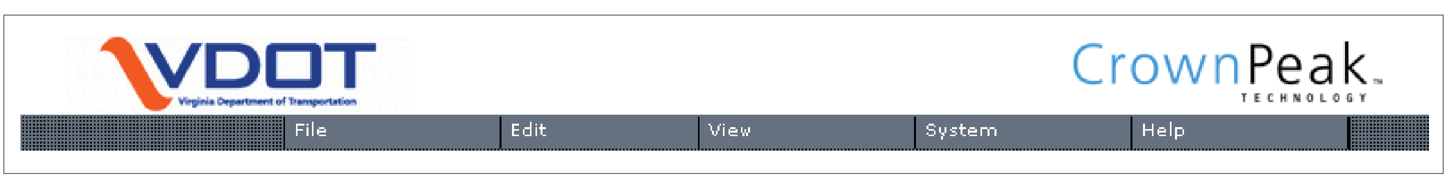


Figure 3 - CMS top navigation.

USER PREFERENCES & SETTINGS

Preferences allow you to customize how you view pages when you first login and when you click on the "Home" link on the left-side navigation. Settings allow you to perform tasks such as changing your username and password as well as be able to provide contact information for other users in the CMS.

Getting to the Preferences Screen

To get to the "Preferences" screen (Figure 4) from the home screen, you have two options: There is a link on the left-side navigation labeled "Preferences" which you can click on, or you can use the top navigation and hover over System > My Account > then click on "Preferences."

Once you get to the "Preference" screen, you will see that it is divided up into five sections: Startup Preferences, Summary Page View, Email Alert Preferences, Folder Preferences and Other.

Startup Preferences

- My home file/folder allows you to change the folder you want to make your home for the CMS. For example, if you are an editor that only works on news releases, you might want to set this to have the "News" folder appear as your home folder to bypass all the other screens. Please note that if you change this setting, you will also need to change the "Login" and "Home" setting.
- Login sets the screen that appears when you first login. The options are:
  - Show my summary view which will show a screen of the last five pages you viewed, the last five modified pages and recently added documents.
  - Show my home file/folder which will show the contents of the folder you specified in the "My home file/folder" input box.
  - Show last file/folder which shows the file or folder you accessed when you were last logged in.
- Home sets the screen you see when you click on the "Home" link on the left-side navigation. The options here are "Show summary view" and Show my home file/folder, which are the same as in the login section.
- My default Browse State(s) affect the way you pre view pages and these have been set so the view of any given page by any user is the same. They should not be changed or altered in any way unless directed by the Web section.

Summary Page View

This preference allows you to customize what you see when you click on the "My summary" link on the left-side navigation.

Email Alert Preferences

This sets what types of email you receive when someone sends out a system-wide message, either when you're part of a group being notified of workflow or when there is a scheduled maintenance for the CMS. These boxes should be kept the way they are unless otherwise directed by the Web section.

Folder Preferences

» "By default sort folder by" lets you set a default for what category your folder is sorted by. You can drop down the menu to see your options.

» The second setting is "Folder page size" which sets the number of files you see in a given folder. The range of file you'll be able to view is from five to 100 files.

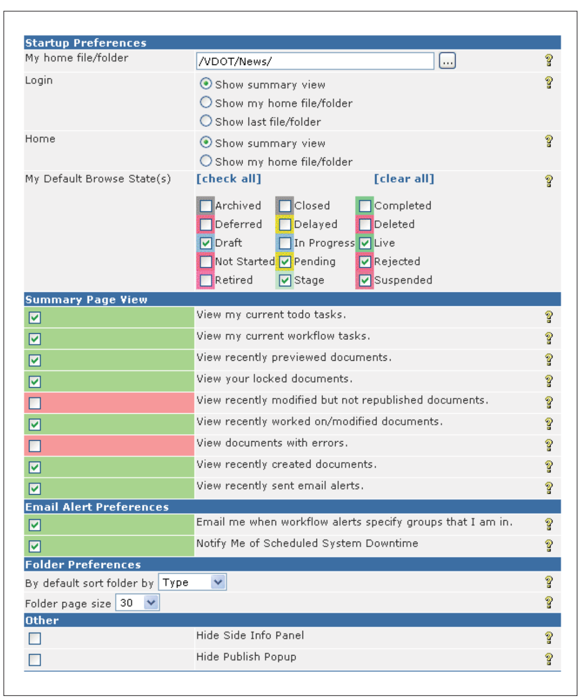


Figure 4 - User preference screen.

Other

There are other options in your preferences screen are "Hide side info panel" and "Hide Publish Popup."

» The former gives you the option to show or hide your left-side navigation. This option should always be unchecked so all the information on the left is available to you at all times.

» The latter hides the popup that appears when you publish out pages.

Once you've completed going through your preferences, you need to make sure to click on the "Save" button available on the top and bottom right corners of the preferences screen. Otherwise, click on "Cancel" to discard your changes.

Getting to the Settings Screen

There are two ways to get to the Settings screen: the first is to locate the icon/avatar which should be the first item on the left-side navigation and click on it; the second method is to use the top navigation and hover over System > My Account > and click on Edit.

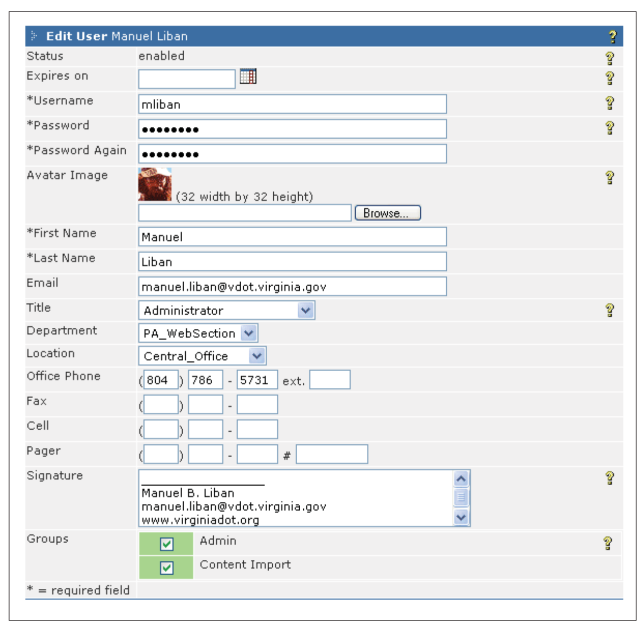


Figure 5 - User settings screen.

Settings

There are a range of personal options you can set in this screen (Figure 5):

- Expires on lets you set your account to expire on a certain date. This field should always be left blank.
- Username is the name you use to login to the CMS. Please note this field if you plan on changing your username. **This is a required field.**
- Password changes the password you use to get into the CMS. This is where you would change the generic password given to you. Once you change it, please take note of it so you may remember it easily when logging on at again. **This is a required field.**
- Password Again confirms what you entered in the "Password" field. **This is a required field.**
- Avatar Image is the image beside your name and seen by other users in the CMS. To change this, click on the default image currently in place and a popup should appear with different options. Choose the image you want to use by clicking on it. It will appear in place of the old image. Likewise, if you want to create your own and use it in the CMS, make sure it is 32x32 pixels in size and upload it by clicking the "Browse" button and selecting it.
- First name should only be changed if you go by something else other than what is already in the input box. T**his is a required field.**
- Last Name should only be changed if you go by something else other that what is already in the input box. **This is a required field.**
- Email is good to have for two functions: when being assigned a task, the CMS will send you a message to this email address. If someone in the CMS needs to contact you from an email account outside of the CMS, they can look up this information. This is not a required field, but would be a good idea to provide one.
- Title is already set for you, but there is an option to change it.
- Department is also preset, but can be changed.
- Location is already set for you, but there is an option to change it.
- Office, Fax, Cell, Pager Phone Numbers are not re quired fields, but if someone needs to contact you via telephone, they can look up your information. At the very least fill out an office and cell phone num ber just in case a user needs to get in touch with you.
- Signature is an optional field and is attached to any message you send via the CMS.
- Don't worry about the "Groups" field.

Once you've completed going through your options, click on the "Save" button available at the top and bottom right corner of the screen. Otherwise, click on "Cancel" to discard your changes.

UPLOADING ASSETS

Most pages in Virginiadot.org require supplemental information in the form of images, documents, video and audio to be placed with the content. These files are appropriately called "Assets" in the CMS.

To make it easier for you to quickly call "Assets" into pages, upload these files first and then create your pages accordingly. There are three folders and procedures for uploading "Assets" into the CMS: the first is for documents and multimedia files which are separated out into sections; the other is a video folder, also separated out into sections; the last folder is a general folder that contains all the images in Virginiadot.org.

Getting to the Assets Folder

Once logged on, locate the top navigation and hover over File > Open and click on "Assets." Here you will see a list of folders with different types of assets.

Uploading Images

Find the folder labeled "images and click on the folder icon beside it. Once in the "images" folder, locate the top navigation and hover over File > New > and click on "image." This should bring you to an input screen where you can upload your image. The fields are as follows:

- Filename lets you name the image you upload. Along with the filename, you must remember to include the extension that came with the file. In other words, if you uploaded "sample.jpg", you can still name the file "sample", but don't forget to include the ".jpg" file extension.
- Image upload is where you will call your file from your machine, a shared drive or a portable drive into the CMS. Use the "Browse" button to show the popup box and follow its instructions. Once you've located and selected your image, click on "Upload" and the input screen should give you a preview of your image and its dimensions in relation to the page. If you make a mistake, the "Clear" button is also there.
- Alt text allows you to put a description of the image. It sits in the background and is commonly used to make the Web page accessible to screen readers. This is an important step to keeping Virginiadot.org accessible to people with hearing and visual impairments.
- Caption acts the same as an alt text, but this text will be visible and help describe what is happening in the image.

Once you've completed going through the input boxes and are ready to upload the image, click on the "Save" button and this should bring you back to the file listing. Just to make sure, you should probably scroll through the image file list and look for the image filename to see that your image has been uploaded.

Uploading Documents, Video and Audio

The procedure for uploading these assets is the same as uploading an image, but their placement will be different. The "Videos" folder is separated out into the major buckets of information. For example, if you have a video on a bridge project, you would simply locate the "projects" folder within video and upload it there.

Documents and audio files are stored in the documents folder. Again, using "Projects" as an example, if you had a PDF document or audio file you wanted to upload, navigate to the "documents" folder then "Projects" folder and upload both files there.

The procedure to upload is the same for all three files:

» Once you're in the correct folder, go to the top navigation and hover over

» File > New > and then click on "Asset."

» Once you're in the input screen, the only fields you need to fill out are the "Filename" and "Label" field.

» Filename lets you find the document on your local machine, shared drive or portable drive and upload it into the CMS. Click on "Browse" and a popup should appear. Navigate to your file and click on "Open" to select it.

» Label is where you would place the filename of your asset. Don't forget to include the extension of the file. Otherwise the file will not be valid when you try to call it into a page.

» All the other fields are not necessary for you to fill out and will not affect your upload in any manner. Feel free to leave these blank.

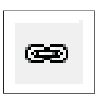
Once you've completed going through the necessary fields, click on the "Save" button. This will save your upload and bring you back to the file listing. It would be a good idea for you to check the file list for your file name to see if your asset has uploaded properly. Otherwise, click on the "Cancel" button to discard your upload.

WYSIWYG OVERVIEW

WYSIWYG is an acronym for "What You See Is What You Get" and it is pronounced "whiz-ee-wig." It refers to the set of icons you use while creating new pages within the CMS.

They should seem familiar to you if you've ever used any version of Microsoft Word. It consists of three parts: creating links, embedding images, documents and formatting tools.

Links



Creating links, whether it is to other pages in Virginiadot.org, an external Web site, a document or someone's email address, is an important part of a Web page. To create a link, first enter your content in the body input box, highlight the text you want to turn into a link and click on one of the following icons:

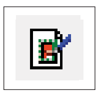
» Link to a document – Some pages require that you upload and link to documents within the CMS to support the content. The most common documents Virginiadot.org pages link to are PDFs, Word or Excel documents. Once you've clicked on this icon, a popup box should come up. Navigate to the assets folder > documents and select the folder which contains your document. Once you find your document, highlight it by clicking on the line once. Go to the bottom right corner and click on "Select."

» Link to an internal (Virginiadot.org) page – Use this icon if you need to link to any page within the VDOT Web site. When you have your text highlighted, click on the icon and a popup box should appear. In the URL field, choose "Other." This indicates the CMS that you want to call up an internal document. In the next field, click on the button with the three periods to bring up another popup box, this time to the file listing for Virginiadot.org. Navigate to the page you want to link to and highlight it by clicking on it once. Then click on the "OK" button on the bottom-right side.

» ·Link to an external page – Linking to an external page uses the same procedure as linking to an internal page except in the URL drop-down menu, select "http:" instead of "other." Also, instead of clicking on the button with the three periods, type in or paste the URL into the field immediately below the URL drop-down box.

» Linking to an email address – Again, use the same procedure as linking to an internal page, but this time, instead of choosing "other" in the URL box, select "mailto" and for the box immediately below the drop-down box after "mailto", enter the email address you want to link to.

Images



Images add emphasis to Web content and should be used when the opportunity is presented. To link an image to a Web page: Click on the image icon to have the image popup box appear. In the first field, find the image you want to use from the "Assets" folder within the CMS by clicking on the button with the three periods. The popup box that comes up when clicking on this button should look familiar since it uses the same format for when linking to an internal document. Once you find your image file, highlight it by clicking on it once and click on the "Select" button on the bottom right corner. Once the image has been selected, the only other field that needs to be filled out is the "Alternate Text" field which you should provide for accessibility. Write a short description of the images.

Formatting Tools

This set of icons (Figure 6) should look similar to the formatting icons used in Microsoft Word and should be self-explanatory:

- » Bold
- » Italic
- » Underline
- » Left align
- » Center align
- » Right align
- » Bullet list
- » Number list
- » Left indent
- » Right indent

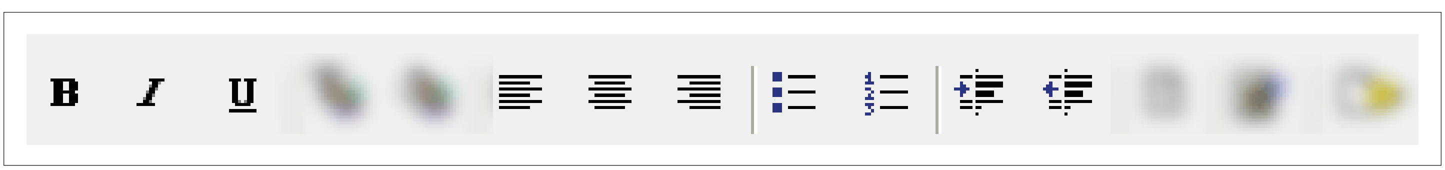
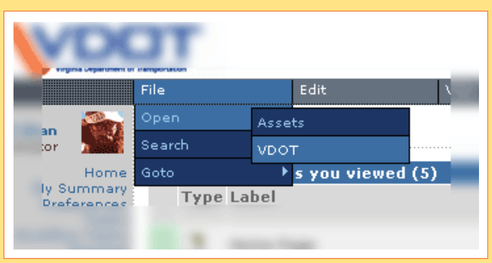


Figure 6 - WYSIWYG formatting tools.

CREATING A NEWS RELEASE

News releases are used to communicate state-wide or area specific news from VDOT and are always posted on the Web site. You can quickly draft your release in Microsoft Word and cut and paste it into the CMS.

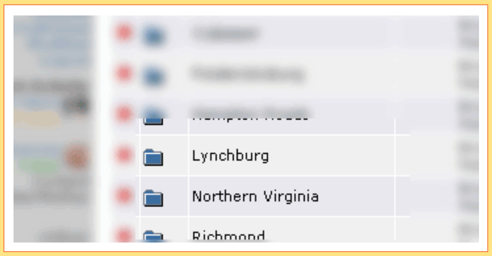
News releases are used to communicate state-wide or area specific news from VDOT and are always posted on the Web site. You can quickly draft your release in Microsoft Word and cut and paste it into the CMS. One thing to note is that before starting on a news release, you should have a Word version of your release ready to cut and paste into the CMS and supporting images and documents already uploaded into the "Assets" folder. Once logged on, follow these procedures to navigate and create your new release.



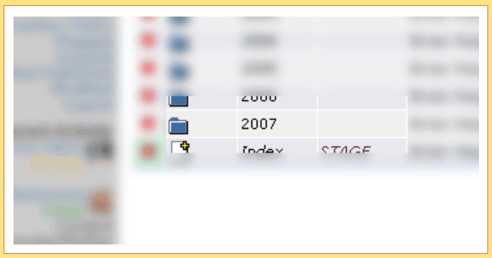
Using the top navigation, hover over File > Open > and click on VDOT to get to the Virginiadot.org folder listing.

Find the folder labeled "News" and click on the folder icon beside it.

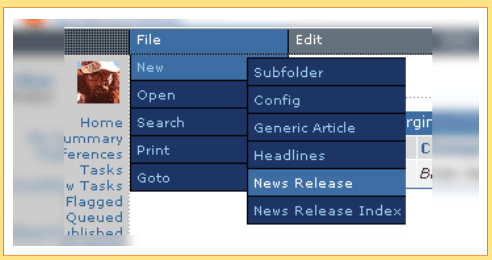
Creating a News Release



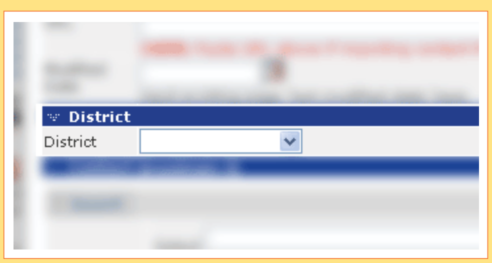
Once in the "News" folder, select the area the release applies to, find its folder and click on the folder icon beside it. For this example, I'll be using "Northern Virginia." So click on the folder icon beside "Northern Virginia."



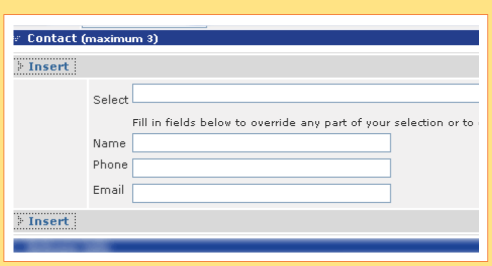
Find the current year and click on the folder icon beside it.



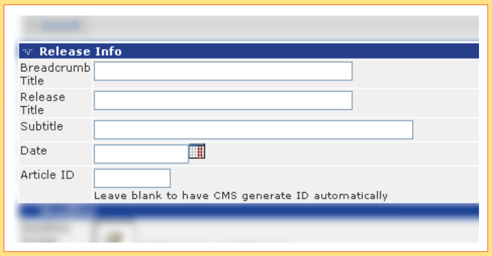
Once you're in the current year's folder, hover over File > New > and click on "News Release." This should bring up a dialogue box to guide you in creating a news release.



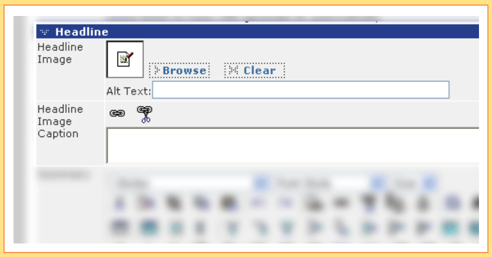
District is where you would select the district this release belongs to.



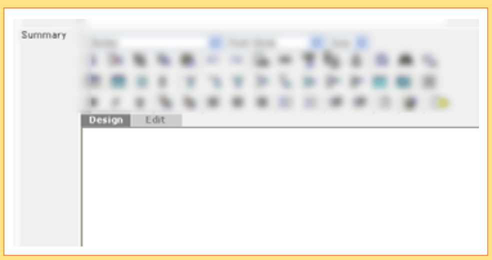
Contact is where you select the person who should be contacted if there are any questions or comments regarding this release. There is a drop-down menu with the most common names and their contact information. However, if you don't find the contact name that you need, the fields right below the drop-down menu should be filled out. This will automatically override the drop-down menu. If you need more than one contact for a release, find the "Insert" button to the left of the "Contact" section and this will provide another name field.



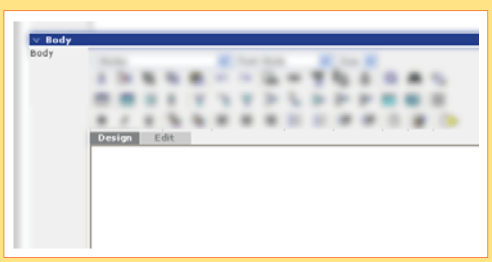
Release Info is for the release's title, date and article ID. This field includes the breadcrumb title (which is usually just the first four or five words in a headline), the release title, a supporting subtitle, the date of the release and the article ID, if it has one.



Headline Image is where you can put a corresponding image with the release, a headline image caption to go with the image, and a summary where you can enter a summary that will show up in the "Headlines" section.



The summary section is where you can type in a few sentences that sums up the news release. This will show up in the "Headlines" page of the news section. Typically, the first paragraph of the news release is entered here.



Last, you will see the "Body" section where you will put all the body copy of your content for the release.

Once you've completed going through the necessary fields, click on the "Save & Preview" button (Figure 7) on the top or bottom corners of the input page to save all your information. Doing so will direct you to a page that will show you a preview of what your page will look like within the Virginiadot.org layout. Clicking on "Cancel" discards all your changes.

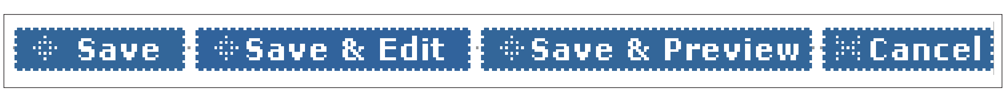
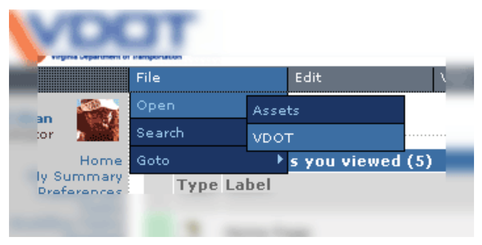


Figure 7 - Saving options for your new page; this is available at the top or bottom right of the input boxes.

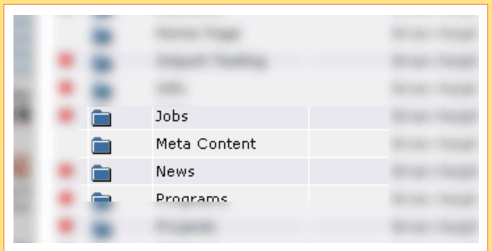
CREATING A PROJECT PAGE

Project pages help create awareness of all the projects and VDOT is involved with as well as its status and contact information if the public has any questions about them.

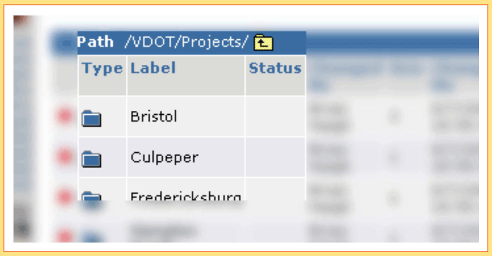
Creating a project page is very similar to creating a news release except for a few extra fields in the input page. Like the news release, you should have your project document ready to cut and paste and all your supporting images and documents uploaded into the "Assets" folder so that you can call them into the page when you're ready.



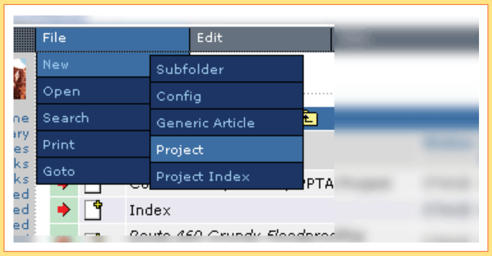
Once logged on, use the top navigation and hover over File > Open > and click on "VDOT."



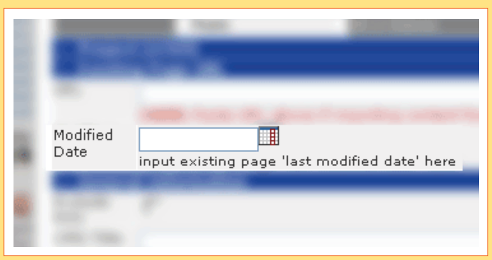
Once there find the folder labeled "Projects" and click on the folder icon beside it.



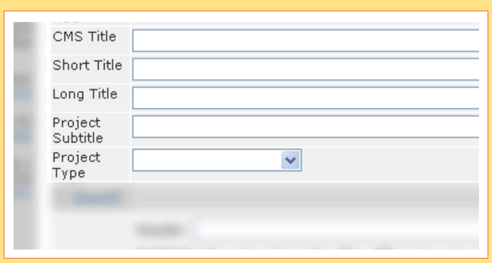
You should now be in another folder listing that includes all the districts available for you to create a project page in. For this example let's use Bristol as an example. Find Bristol on the folder listing and click on the folder icon beside it.



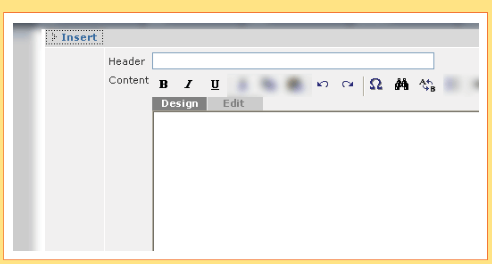
Once inside the Bristol folder, hover over File > New > and click on project. This should bring up an input page where you can enter in all the project details including any documents or images you need for the project.



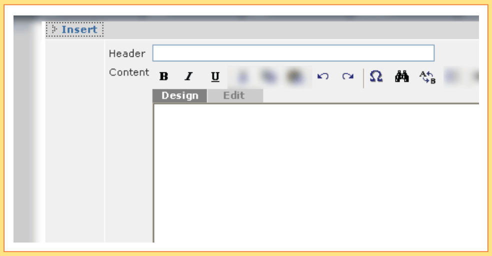
To make sure that visitors of Virginiadot.org know when this page was last updated, specify the time this project page was last modified. Since this is a new page, just use the current date. If you were making updates, the date of the updates should be entered.



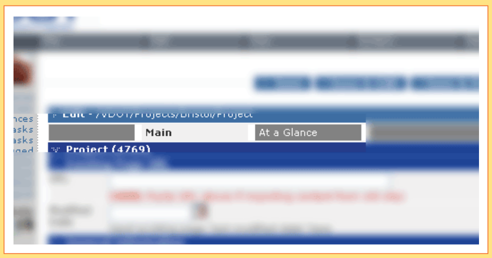
Under the "General Information" section, fill out the following fields: "CMS Title" is for the title that shows when looking at a list of project pages in the "Bristol" folder; "Short Title" will appear in the breadcrumbs; "Long Title" appears with the content; "Project Subtitle" appears in the project listing page underneath the "Long Title;" then select the "Project Type" from the drop-dwon box.



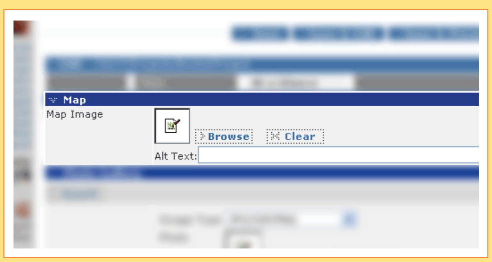
The next section is for the project body copy.



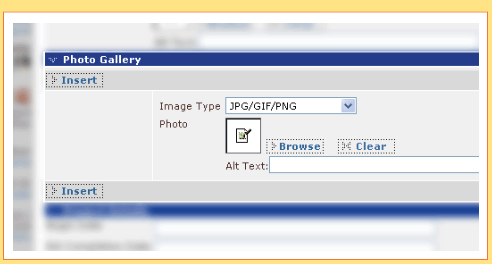
The next section is for the project body copy.



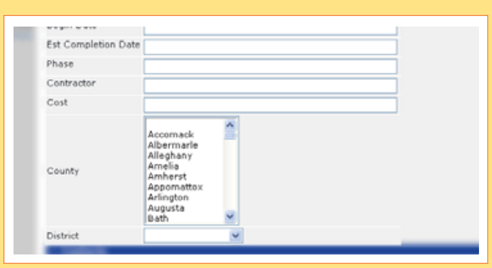
If you haven't already noticed, there are two parts to this page. Navigate to the top where the tabs are located. They should be labeled "Main" and "At a Glance." Once you're finished with the "Main" section, click on "At a Glance" to get the second input page. Where the "Main" section took care of the content in the middle, this section takes care of the column on the right side of project pages.



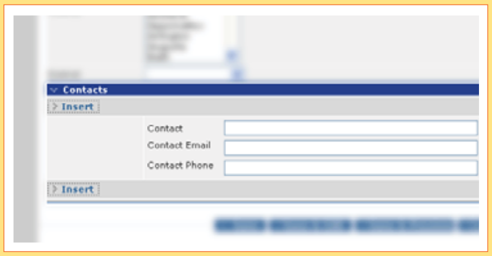
If you have a map of the project and available in an image format, you can put that in the "Map" section.



If you have one or more photos to share about the project, you can create a photo gallery in the next section called "Photo Gallery."



The next section labeled "Project Details" is self-explanatory and contains fields such as beginning date, cost, county, and district. These fields are not required and can be filled out according to the available information.



In the "Contacts" field, you can put the person to contact for this particular project's inquiries. If there is more than one person available for contact, click on the button labeled "Insert" to create another contact form.

Once you've completed going through all the information necessary for a project, click on "Save & Preview" (Figure 8) at the top or bottom corner of input page to preview your work. Otherwise, click on the "Cancel" button to discard your changes.

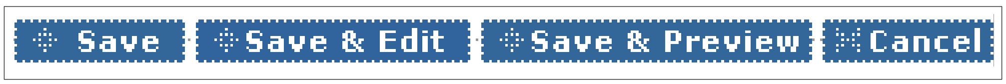
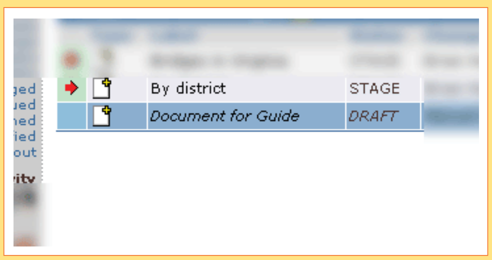


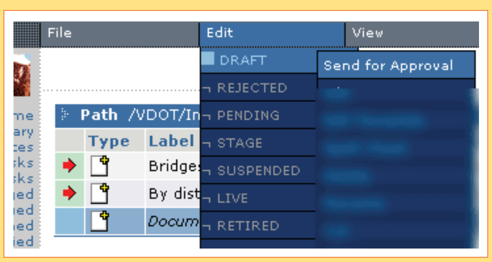
Figure 7 - Saving options for your new page; this is available at the top or bottom right of the input boxes.

STAGING PAGES

Once you've completed going through all your information in any new page you've created or editing any existing page, you are now ready to have it reviewed by the Web section.



Highlight your document by cliking on it once making sure *not* to click on the file's icon on the left side.



Go to the top navigation and hover over Edit > Draft > and click on "Send for Approval."

This will prompt the Web section to check the submitted pages and let you know whether or not your page has been approved or rejected. If it has been approved, no additional action is needed and the page will be moved to the staging area. If rejected, you will be contacted about what you need to change, whether it is through the task system on the CMS, email or telephone, depending on how soon a page needs to be posted.

GETTING HELP

Questions, comments, concerns or suggestions for the CMS or Virginiadot.org in general? Use one of the following methods below.

Web section

Do you have any questions, comments or concerns about any of the following topics?

» Virginiadot.org
» CrownPeak CMS
» Feedback (Virginiadot.org or training for Crown Peak)
» How to write for the Web
» Training sessions, content, or documents
» Training Web site

Please contact:

Wayne Scarberry
Web Content Manager
804-371-6849
wayne.scarberry@vdot.virginia.gov

Online Reference

If there are changes to the CMS that are not reflected in this guide such as menus, input pages or any other general changes in the CMS, this information is also posted in the training Web site. Additional resources include a style guide for writing for the Web, this guide in PDF format for internal distribution, transcripts to the available videos and modules for the sections in this guide. This guide and supporting materials for the CrownPeak CMS can be found online at **http://cowwwdev1/cms_training/index.html**.