

Active Quick-Start Guide for Content Authors

Active CMS v8.3


Marketing & Communications Department

Ken Barbour & Linda Young

Welcome to Active CM

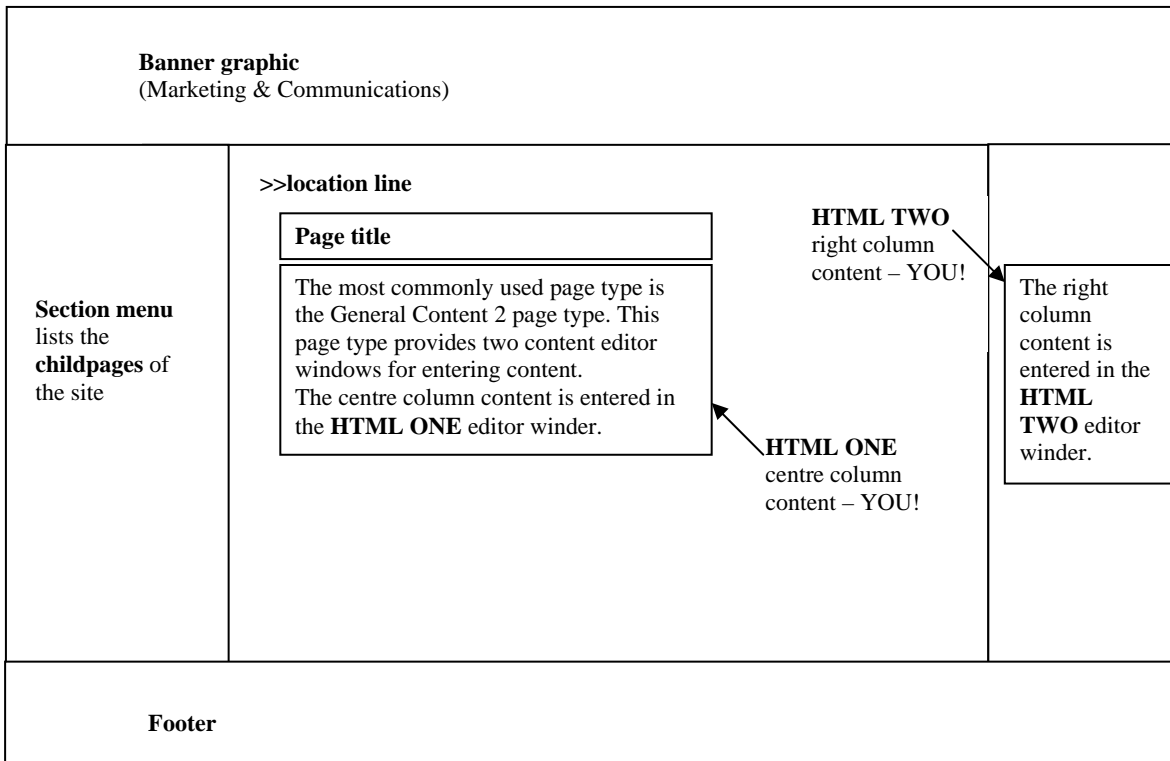
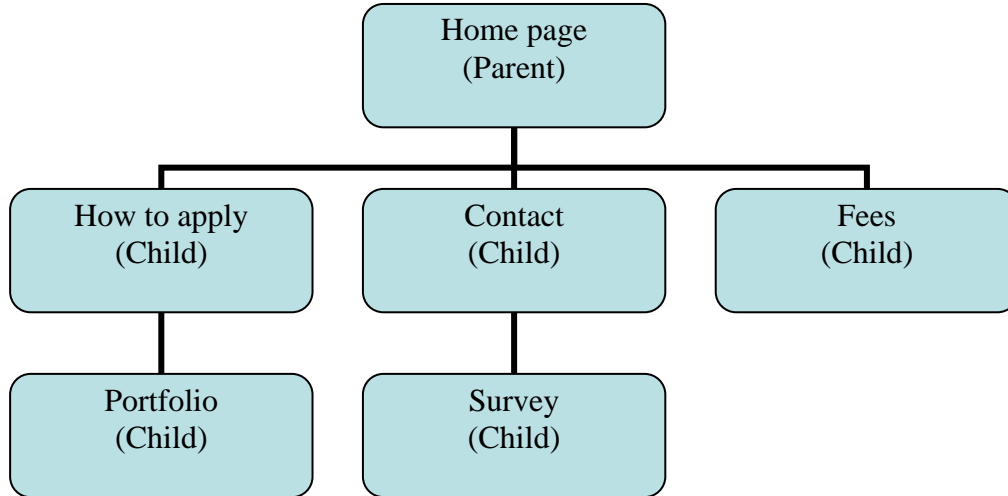
The Active CMS™ provides an easy-to-use interface that allows you to input content to your website directly. If you can surf the web and type an e-mail, you can use Active to help you input, control and publish your information.

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Important Active CM Concept: 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.



Active CMS Quick Start Guide – Getting Started

Getting Started:

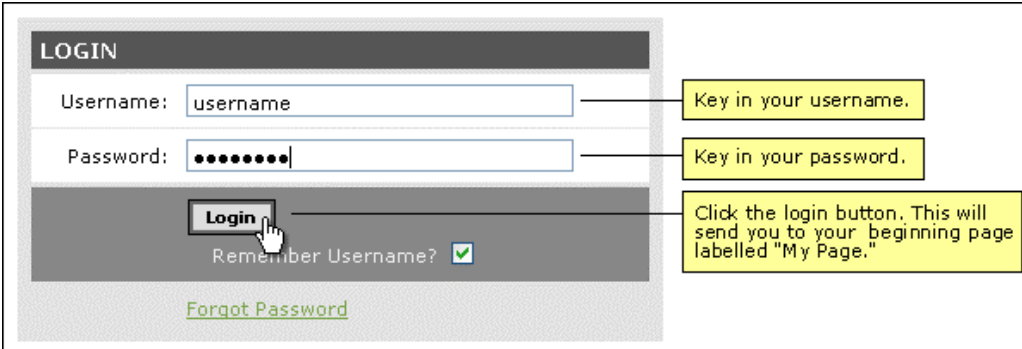
Your web team, Trula, Ken, and Linda, has preconfigured the system to allow you to post content in your areas of responsibility. Follow this step-by-step guide to access the system, edit, post, and format your content and empower yourself to change the web.

Step 1: Accessing your website and logging in.

Start

To begin using Active, all you need is a connection to the Internet and a personal computer with the latest version of Microsoft Internet Explorer. There is no new software to install. The system is 100% Web based, meaning that your computer is already equipped to use the tool. To get started managing the content on your website(s)...

1. Open a Web browser and go to the homepage of Active Publishing.
2. Site URL = <http://dynamic.capcollege.bc.ca>. Click on the Login on the right side of the page near the top. You should now be at a page that has a login box that looks like the following. Fill in your Username and Password provided by the Active administrator. If you experience any problems, please email us at wsg@capcollege.bc.ca with as much detail as possible.



The image shows a screenshot of a web browser displaying a login page. The page has a dark header with the word "LOGIN" in white. Below the header, there are two input fields: "Username:" with the text "username" and "Password:" with a masked password of seven dots. To the right of the password field, there is a "Login" button. Below the button, there is a "Remember Username?" checkbox which is checked. At the bottom of the login area, there is a link that says "Forgot Password". Three yellow callout boxes with black text and lines pointing to the form elements provide instructions: "Key in your username." points to the username field, "Key in your password." points to the password field, and "Click the login button. This will send you to your beginning page labelled 'My Page.'" points to the Login button.

Once you successfully login for the first time, you will see your home screen called "My Page".

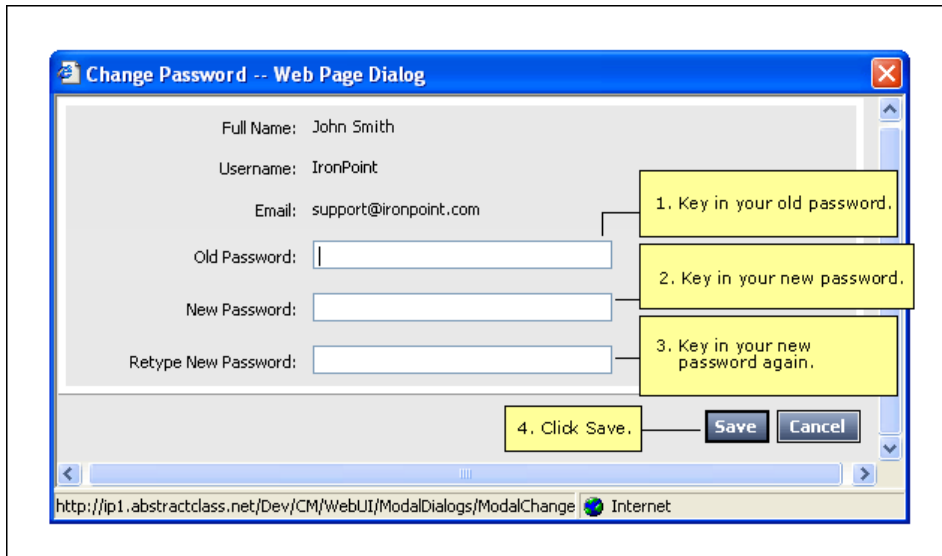
Step 2: My Page

My Page is your personal electronic dashboard or home screen. You work from My Page when making changes to your webpage(s). On My Page, you can view your personal information and rights, and change your password(s). My Page can be set as your default homepage upon login if you like.

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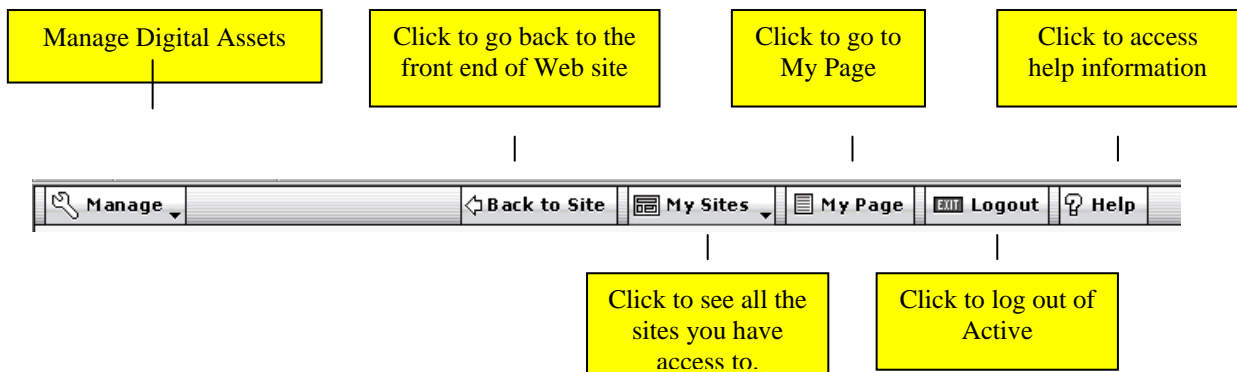
The screenshot shows a user profile management interface. At the top, there are 'Save' and 'Cancel' buttons. A callout box points to these buttons, stating: "When you have entered all the information you want, click 'Save.'". Below this is a header bar with "Welcome IronPoint" on the left and "December 2, 8:19 AM" on the right. A callout box points to the "Make this my home page:" checkbox, stating: "To make 'My Page' your homepage, check the 'Make this my home page' box." The main form contains several input fields: "First Name:" (John), "Middle Name:" (D), "Last Name:" (Smith), "Preferred Full Name:" (IronPoint), and "Email:" (support@ironpoint.com). A callout box points to these fields, stating: "Key in changes to your personal information." Below the email field is a "Change Password" button. A callout box points to this button, stating: "To change your password, click the 'Change Password' button. It will take you to the Change Password screen." Below the password field is a "Use WYSIWYG Editor:" checkbox (checked) and a "View Rights" link. A callout box points to the "Use WYSIWYG Editor:" checkbox, stating: "To use the WYSIWYG editor in Edit Mode, check the 'Use WYSIWYG Editor' box." Another callout box points to the "View Rights" link, stating: "To view your rights within IronPoint, click the 'View Rights' link."

Change Password Screen:



Step 3: Admin Toolbar

The Admin toolbar is located on the top of the screen. It serves as your means of moving around the Active system. For most users the toolbar will look like the one below. Users with extra responsibilities will see more links on the toolbar. Most users will see the Admin Toolbar at the top of My Page as it appears below.



Step 4: Editing Your Webpage(s)

Active allows you to edit a page by simply clicking on one of the Edit Content icons



You can edit your page area directly, or copy and paste the contents of a file onto the page. Changes are instantaneous, and you can see the page while you work exactly as it will appear on the web. Once you complete your changes and click the "Publish" button your page will be saved until the next scheduled publish date for your site.

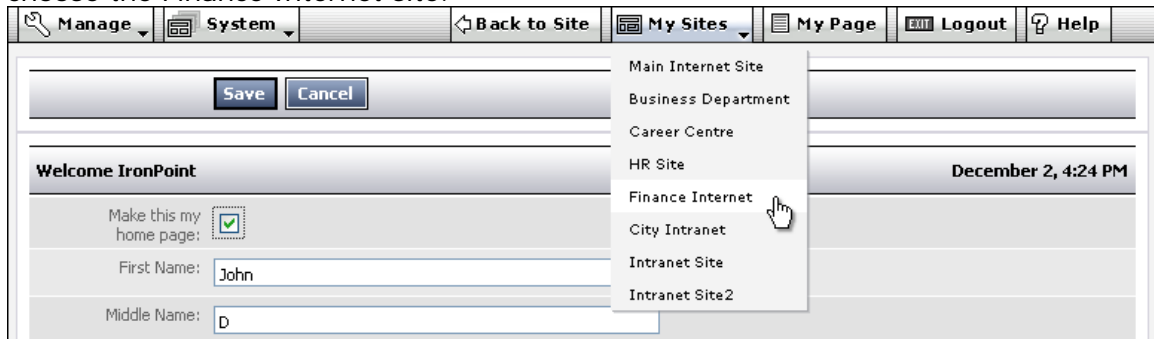
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If you select “Emergency Publish”, your page will immediately publish to the live website.



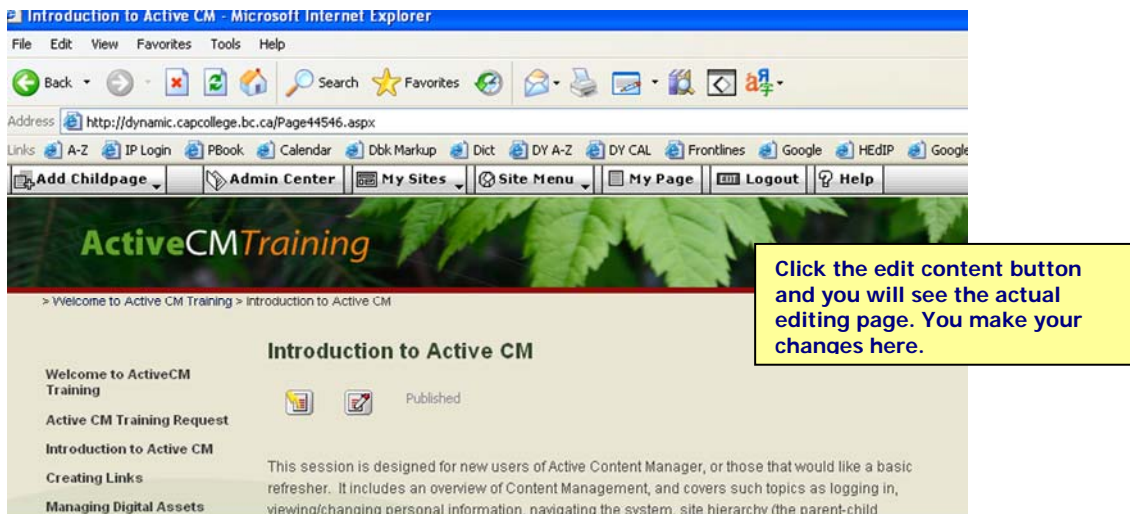
To Edit a Page

From My Page click on the My Sites link and choose the site that you want to edit. You will only see sites you have editing rights to. For example in this case we choose the Finance Internet site.



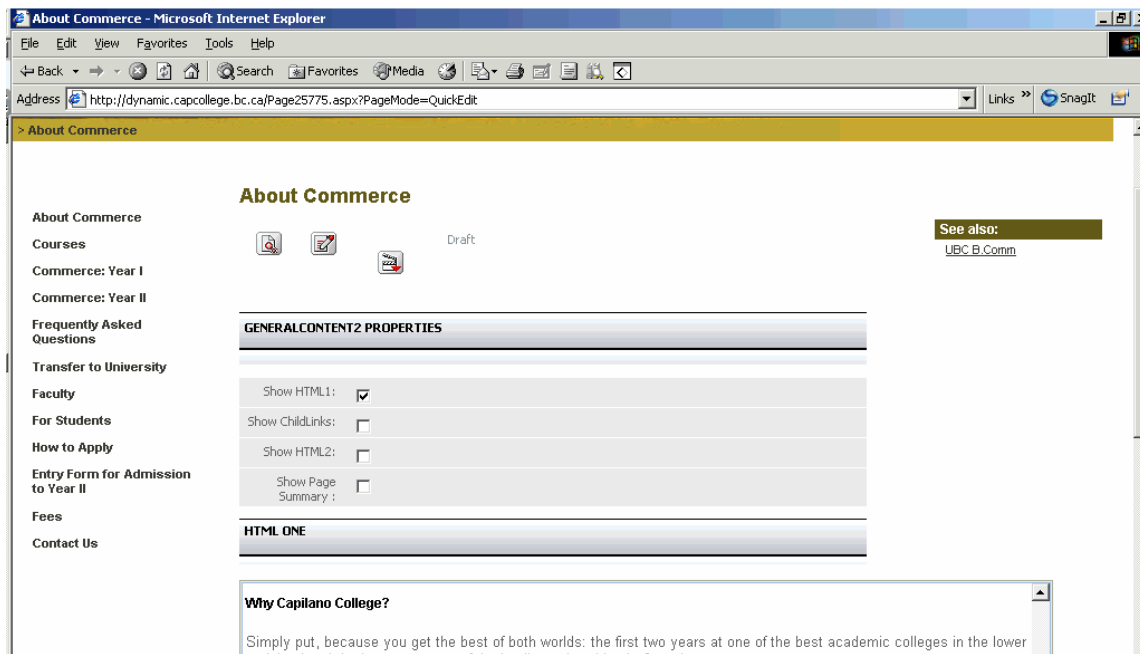
Once you click on a site you will be sent to the View Mode of its Homepage. This means that you will be “viewing” the site as you would a public user, except that you will have the Admin Menu at the top of the page and specific editing buttons for pages that you have access to.


Here is a site in View Mode.



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This is a site in Quick Edit Mode.




 **Note:** If the **Quick Edit Icon** does not appear where you wish to edit your page you do not have the right to edit this page. Please contact Ken local 7852, Trula local 7896 or Linda local 7518 for assistance.

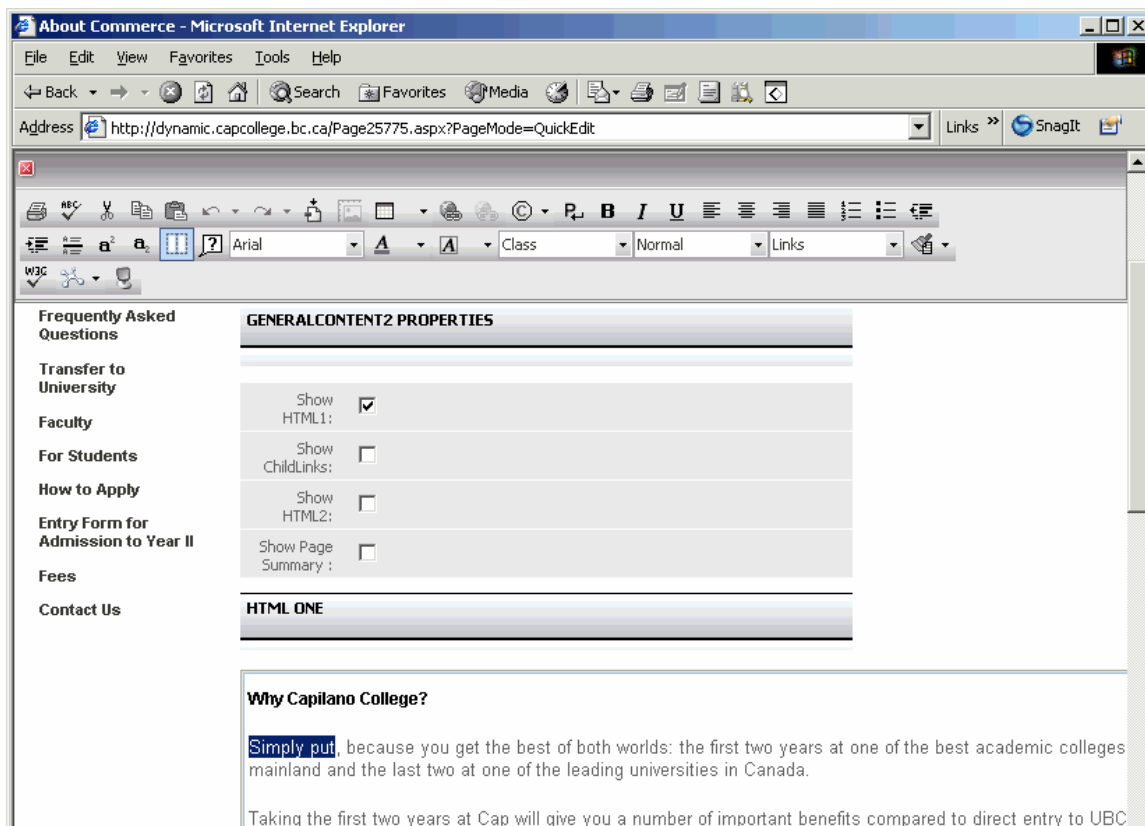
When you click on the Quick Edit button, you are able to edit the content in your webpage.

Step 5: Editing Page Content

This editing page is designed to allow you to use much of your word process knowledge. Where ever possible buttons mean the same as they do in a product like Microsoft Word. For example the  button means print just as it does in Word and many other programs.

The actual text for your webpage(s) can be typed directly into the text boxes on the editing page. You can even copy from an existing document and paste it into the text box. Notice that when you click on the text you wish to edit your tools appear in the top of your window. When you don't want these tools in your window, click on the  at the top left side of the webpage.

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HTML Editor Overview



The HTML Editor used in the Active CMS works within your web-browser, giving you the ability to edit your web content. Not all of the features described below will be available to all users. There are many good reasons for this – too many to go into in this document. If you are interested in knowing more about how the application has been set up for you give Ken, or Trula a call.

The content placeholders you see on various pages contain the content that can be edited by users. Placeholders keep the page content and business logic separate from the page design. In other words, these placeholders make sure that all you have to deal with is the content of your site and not the underlying technology.

The user rights as assigned by Ken and Trula determine the type of content and formatting options in a placeholder. For example, your rights might be set up in a way that:

- A placeholder will allow you to add text but not to change the font.
- A placeholder will accept an image only.

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- A placeholder will accept a variety of content, such as text typed directly into it, drag-and-drop text or images, or other files from a folder or a desktop application.

For explanation of all the editors' functions please see Appendix 1.1.

Within the various sections of the **Edit** screen, you can also perform a variety of functions. These are detailed below:

The Action Menu

The Action Menu is a drop-down menu of all the possible actions you can take with the content of the page you are working on.



You could have access to a selection of the following actions, depending on the rights you have been assigned within the Active application:

Preview

A page can be previewed before it is published to check formatting; when the Preview button is clicked, the page will pop up in a new window with the appropriate content and design.

Cancel

Cancels all actions taken on the page since your last "Save"

Save

At times, you may not be able or want to complete all of your updates at one sitting. The "Save" button can be pressed if you are working on a document over a couple of hours or days and you want to save your work. You can return to that page and complete your updates later. The page is NOT published to the World Wide Web when you click "Save".

Vote Approve

This is available to content approvers to signal approval of the page content. When this button is clicked, the page will continue through the next steps of the approval process.

Vote Reject

This is available to content approvers to signal rejection of the page content. When this button is clicked, the page will be routed back to the content provider(s) for change or deletion.

Edit

This is available to content approvers to edit the content before resubmitting for approval. Note that this button must be pressed to edit the content – if this button is not clicked before editing content, then the content changes will be lost.

Re-Submit for Approval

This is available to content approvers after they have edited a page of content. This button routes the content back to the existing level of approval for content checking after edits are made.

Emergency Publish

If you select “Emergency Publish”, your page will immediately publish to the live website.

Publish

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

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.

Appendix 1.1 WYSIWYG Editor Features

Print

Shortcut Ctrl + p

This tool allows users to print from the HTML editor. Pressing this button will launch your default printers' dialog box. If you press **[OK]** or **[Print]**, the current page in your web browser will print. You can set your printers' properties before printing.

To Print

1. Click Print on the Standard toolbar.

Spell Check

This tool allows users to spell check content.

The spellchecker is a tool, which checks the spelling of the written text. It works the same way as in Microsoft Word®. When launched, the spellchecker dialog will appear and the checking will start automatically from the beginning of the document. If there is a mistaken word, it will appear in the spellchecker dialog, where you can either **[Ignore]** the suggestion or **[Change]** the word with the suggested one.

To Check Spelling

1. On the Standard toolbar, click Spell Check.
2. When the tool finds a spelling mistake, you have the following options.
 - a. Ignore – Ignores this specific word in this instance
 - b. Ignore All – Ignores this word throughout the document
 - c. Add Custom – Adds this word to a custom dictionary for the site
 - d. Change – Changes this specific work in this instance
 - e. Change All – Changes this word throughout the document.
3. **Note** If you mistype a word but the result is not a misspelling (for example, "from" instead of "form" or "there" instead of "their"), the spelling checker will not flag the word.

Cut

This tool allows users to cut content from the HTML editor.

Cutting Content

1. Select the item you want to cut.
2. To move the item, click Cut on the Standard
3. If you want to move or copy the item to another document or page, switch to the document or page
4. Click where you want the item to appear.
5. Click Paste on the Standard toolbar.

Copy

This tool allows users to copy content from the HTML editor

Copying Content

1. Select the item you want to move or copy.
2. To copy the item, click Copy on the Standard toolbar.
3. If you want to move or copy the item to another document or page, switch to the document or page.
4. Click where you want the item to appear.
5. Click **Paste** on the Standard toolbar.

Paste

This tool allows users to paste content into the HTML editor.

To Paste Items

1. Click where you want the item to appear.
2. Click Paste on the Standard toolbar.

Undo

This tool allows users to undo changes made in the HTML editor.

To Undo a Command

1. On the Edit menu, click Undo
2. If you cannot undo the last action, the undo command will be greyed out.

Redo

This tool allows users to redo changes made in the HTML editor.

To Redo a Command

1. On the Edit menu, click Redo.
2. If you cannot repeat the last action, the Redo command will be greyed out.

Insert Digital Assets

This tool allows the user to add digital assets from the digital asset manager.

Users can find assets using the tree view or the Search tab. To insert an asset the user clicks the insert button. Users can open the asset in a same window or new window. See additional document, *Uploading and Managing Digital Assets*.

To Set Image Properties

1. Select the image that you wish to modify right-click.
2. Click **Set Image Properties**.
3. Optionally set the following parameters on the **Image Properties Tab**.
 - a. **Border Width** – The width of the frame around the image.
 - b. **Border Color** – The colour of the frame around the image.
 - c. **Image Alt Text** - The Alternative Text that will display when a user mouses over the image.
 - d. **Image Align** – The alignment of the image within the text area.
 - e. **Horizontal Spacing** – The amount of horizontal space on both the left and the right of the image.
 - f. **Vertical Spacing** – The amount of vertical space on both the top and the bottom of the image.
 - g. **Width** – The width of the image.
 - h. **Height** – The height of the image.
 - i. **Constrain** – Note that the user can decide if they wish to constrain the height and the width of the image such that they are always in proportion. This is done by clicking on the two magnet icons to the left of the word constrain.
4. Click the **Image Information Tab** to view information about the image including:
 - a. **Image Name**
 - b. **Image Size**
 - c. **Image Width**
 - d. **Image Height**

Image Absolute Position

This tool Allows users to set the exact position of images in the HTML editor.

To Set Absolute Position

1. Select the image you want to position.
2. On the Formatting toolbar, click **Image Absolute Position**.
3. Click on the image and drag it to the desired position.

Tables

This tool allows users to insert and format tables in the HTML editor.

The insert table tool offers two ways to make a table. The best way depends on how you like to work, and on how simple or complex the table needs to be.

Method 1 - Inserting a Quick Table

1. Click where you want to create a table.
2. Click **Insert Table** on the formatting toolbar.
3. Drag to select the number of rows and columns you want.

Method 2 - Inserting a Table Using the Table Wizard

1. Click where you want to create a table.
2. Click **Insert Table** on the formatting toolbar.
3. Click **Table Wizard**.
4. **Table Wizard** has three tabs:
 - a. **Table Design**
 - i. To insert or delete rows or columns simply click the appropriate **Plus or Minus Buttons**.
 - ii. To increase or decrease column or row span (size) simply click on the row or column that you wish to increase or decrease and then click the appropriate **Plus or Minus Button**.
 - b. **Table Properties**
 - i. **Layout**
 1. **Alignment** – This aligns the entire table within the HTML editor.
 2. **Cell Spacing** – This determines the amount of space between cells in the table
 3. **Cell Padding** – This determines the amount of space between the content in the cell and border of the cell
 - ii. **Dimensions**
 1. **Height** – This determines the height of the entire table.
 2. **Width** – This determines the width of the entire table.
 - iii. **Background**
 1. **Use Color** – This determines whether a background color will be used for the table.
 2. **Color Dropdown** – This determines which color will be used in the background of the table.
 - iv. **Border**
 1. **Size** – This determines the size of the border around the table.
 2. **Frame** – This determines where the border will appear around the table.
 3. **Rules** – This determines where the border will appear within the table.
 - v. **Cell CSS**
 1. **CSS Class** – This determines a CSS class for a table's content.
 2. **Style** – This determines a style for a table's content.
 - c. **Cell Properties (note that you must select the cell that you wish to format before setting these properties)**
 - i. **Dimensions**
 1. **Height** – This determines the height of the cell.
 2. **Width** – This determines the width of the cell.
 - ii. **Content Alignment**
 1. **Horizontal** – This determines the horizontal layout of the content within the cell.
 2. **Vertical** – This determines the vertical layout of the content within the cell.
 - iii. **Background**
 1. **Use Color** – This determines whether a background color will be used for the cell.

2. **Color Dropdown** – This determines which color will be used in the background of the cell.
- iv. **Additional**
 1. **Content** – This text area allows you to add content to a cell.
 2. **No Wrapping** – This checkbox when clicked will make content not wrap.

Inserting Rows into Tables

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

Inserting Columns into Tables

1. Click where you want to insert a column.
2. Right click and select either **Insert Column Above** or **Insert Column Below**.

Editing Table Properties

1. Right click on the table and select **Set Table Properties**
 - a. **Layout**
 - i. **Alignment** – This aligns the entire table within the HTML editor.
 - ii. **Cell Spacing** – This determines the amount of space between cells in the table
 - iii. **Cell Padding** – This determines the amount of space between the content in the cell and border of the cell
 - b. **Dimensions**
 - i. **Height** – This determines the height of the entire table.
 - ii. **Width** – This determines the width of the entire table.
 - c. **Background**
 - i. **Use Color** – This determines whether a background color will be used for the table.
 - ii. **Color Dropdown** – This determines which color will be used in the background of the table.
 - d. **Border**
 - i. **Size** – This determines the size of the border around the table.
 - ii. **Frame** – This determines where the border will appear around the table.
 - iii. **Rules** – This determines where the border will appear within the table.
 - e. **Cell CSS**
 - i. **CSS Class** – This determines a CSS class for a table's content.
 - ii. **Style** – This determines a style for a table's content.
2. Click **Update**.

Editing Cell Properties

1. Right click on the cell and select **Set Cell Properties**.
 - a. **Dimensions**

- i. **Height** – This determines the height of the cell.
 - ii. **Width** – This determines the width of the cell.
 - b. **Content Alignment**
 - i. **Horizontal** – This determines the horizontal layout of the content within the cell.
 - ii. **Vertical** – This determines the vertical layout of the content within the cell.
 - c. **Background**
 - i. **Use Color** – This determines whether a background color will be used for the cell.
 - ii. **Color Dropdown** – This determines which color will be used in the background of the cell.
 - d. **Additional**
 - i. **Content** – This text area allows you to add content to a cell.
 - ii. **No Wrapping** – This checkbox when clicked will make content not wrap.
2. Click **Update**.

Showing or Hiding Borders

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

Creating Links

This tool allows users to create internal and external links in the HTML editor.

1. Select the item (image, text) you want linked.
2. Click **Create Link** on the standard toolbar.

Internal Link

- i. Choose a page to link to: select a page
- ii. If you are linking to a spot on a page, choose Anchors and select the Anchor name.
- iii. Choose if the linked page opens in the same or new window.

External Link

- i. Address: Choose http:// and type or paste target address
- ii. Type title of target page in the Title field.
- iii. Choose if the linked page opens in the same or new window.

E-mail/External Link

- i. Address –Choose mailto: and type the e-mail address
- ii. Type the address in the title field

Anchor Link on same page:

- i. Select the named anchor
- ii. Type title of the anchor link

Insert Anchor

- i. Place your cursor where you want the anchor to be
- ii. Type the name of the anchor

3. Click **OK**.

Unlink

Allows users to undo any linking in the HTML editor.

Symbols

This tool allows users to insert symbols.

Symbols and special characters that don't appear on your keyboard can be displayed on your screen and printed. For example, you can insert symbols such as « and ©.

To Insert a Symbol

1. Click where you want to insert the symbol
2. On standard toolbar, click Symbol.
3. Click the symbol that you want to insert.

Insert Paragraph

This tool allows users to insert paragraphs.

There is a difference between Enter <p> and Shift Enter

AS in MS Word, enter is a paragraph break (larger break), whereas shift + enter is a line break (just one space).

Bold

This tool allows users to bold text in the HTML editor.

To Apply Bold

1. Select the text you want to change.
2. On the Formatting toolbar, click Bold.

To Remove Bold

1. Select the bolded text you want to change.

2. On the Formatting toolbar, click Bold.

Italic

This tool allows users to italicise text in the HTML editor.

To Apply Italics

1. Select the text you want to change.
2. On the Formatting toolbar, click Italics.

To Remove Italics

1. Select the italicized text you want to change.
2. On the Formatting toolbar, click Italics.

Text Justification



Justify Center

This tool allows users to center justify content in the HTML editor.

1. Select the text you want to center.
2. On the **Formatting** toolbar (toolbar: A bar with buttons and options that you use to carry out commands. To display a toolbar, click Customize on the Tools menu, and then click the Toolbars tab.), click **Center**.

Justify Full

This tool allows users to full justify content in the HTML editor.

1. Select the text you want to justify (justify: To adjust horizontal spacing so that text is aligned evenly along both the left and right margins. Justifying text creates a smooth edge on both sides.).
2. On the Formatting, click **Justify**.

Justify Left

This tool allows users to left justify content in the HTML editor.

1. Select the text you want to align.
2. On the Formatting toolbar, click Align Left.

Justify Right

This tool allows users to right justify content in the HTML editor.

1. Select the text you want to align.
2. On the Formatting toolbar, click Align Right.

Insert Ordered List

Allows users to insert numbered lists in the HTML editor.

The HTML editor can automatically create numbered lists as you type, or you can quickly add numbers to existing lines of text.

Creating Numbered Lists

1. To start a numbered list click on ordered list in the formatting toolbar
2. Type any text you want.
3. Press ENTER to add the next list item.
4. The HTML editor automatically inserts the next number.
5. To finish the list, press ENTER twice, or press BACKSPACE to delete the last bullet or number in the list.

Add Numbering to Existing Text

1. Select the items you want to add numbering to.
2. On the Formatting toolbar, click ordered list.

Indent

This tool allows users to indent content in the HTML editor.

To Indent Text

1. Select the paragraph you want to change.
2. On the Formatting toolbar, click Indent.
3. The HTML Editor increases the indent by one tab stop per click.

Outdent

This tool allows users to outdent content in the HTML editor.

To Outdent Text

1. Select the paragraph you want to change.
2. On the Formatting toolbar click, outdent.
3. The HTML Editor decreases the outdent by one tab stop per click

Superscript

This tool allows users to create superscript content in the HTML editor.

1. Select the text you want to format as superscript (superscript: Describes text that is slightly higher than other text on a line, such as a footnote reference mark.
2. On Standard toolbar, click **superscript**.

Subscript

This tool allows users to create subscript content in the HTML editor.

1. Select the text you want to format as subscript (subscript: Describes text that is slightly lower than other text on a line. Subscripts are often used in scientific formulas.)
2. On Standard toolbar, click **subscript**.

Toggle Borders

This tool allows users to toggle borders on tables.

Help

This tool allows users to get quick help in the HTML editor.

Links

This tool allows users to custom links in the HTML editor

Sweeper

This tool allows users to sweep content for:

1. All HTML Tags
2. Microsoft Word Formatting

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3. Cascading Style Sheets
4. Font Tags
5. Span Tags

To Sweep Content

1. On the standard toolbar click the sweeping method you want in the sweeping menu.

W3C

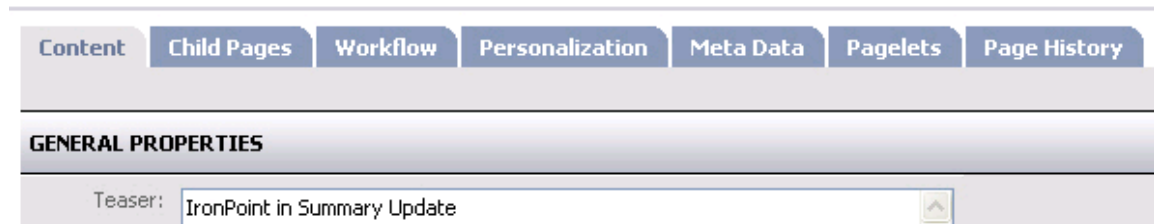
Allows users to diagnose and clean W3C issues to comply with WAI priority 1 & 2 guidelines.

To diagnose the HTML click on the Diagnose tool. To clean the HTML click on the clean tool.

Snippets

This tool will insert a predefined code snippet into the selected place in the editor.

Appendix 1.2 Page Editor Sections & Tabs



Child Pages Tab (for adding additional pages)