

Bryant University
Content Management System (CMS)

Web Content Manager – Quick Start Guide

February 24, 2010

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Introduction

How to get to the Interface

The content management system can be found by opening a web browser and navigating to the following URL:

<http://webcm.bryant.edu:9081/wps/portal>

How to Login

The first requirement is logging in with your network/email userid and password.

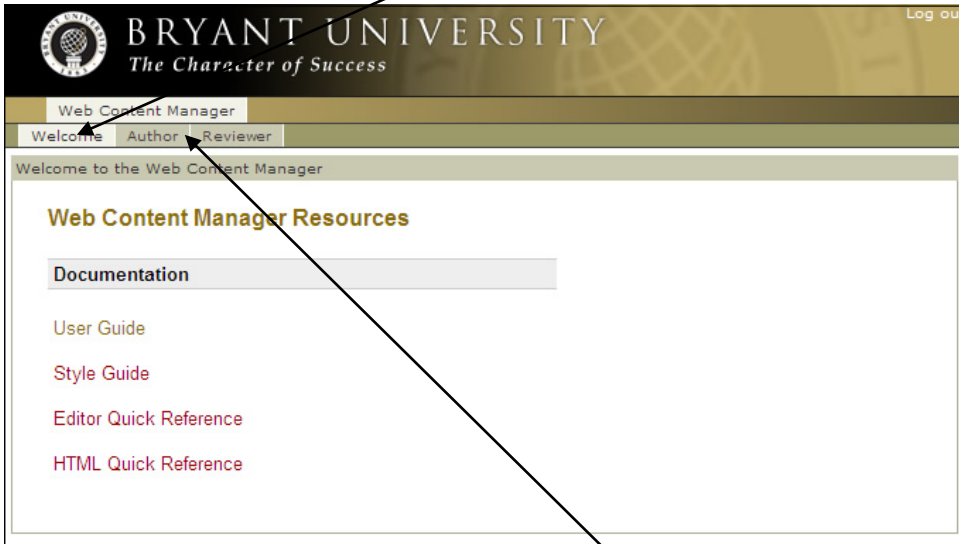


The screenshot shows a web interface for Bryant University. At the top is a dark banner with the university's logo on the left and the text "BRYANT UNIVERSITY" and "The Character of Success" on the right. Below this is a "Login Portlet" window. The window has a title bar with "Login Portlet" and a question mark icon. Inside the window, there are two input fields: "User ID:" with the text "jdoe" and "Password:" with masked characters "*****". Below the input fields are two buttons: "Log in" and "Cancel". An arrow points from the text above to the "User ID:" field.

This is the same userid and password that you use to log in to the network, and to retrieve email.

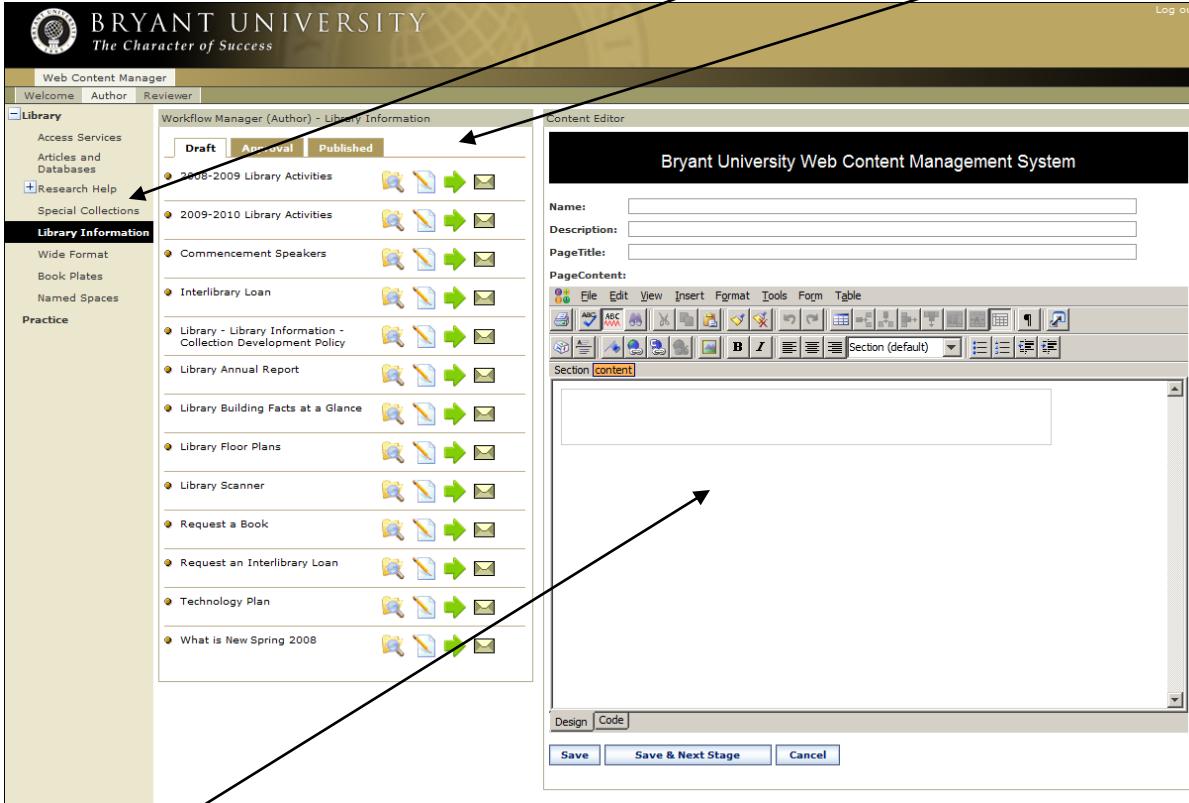
The Web Content Manager

After successfully logging in, the Welcome page is displayed. You will find links to the documentation and other useful resources:



The welcome page includes tabs for the **Author** and **Reviewer**. Based upon your role, you will navigate to either the Author or Reviewer area.

The Web Content manager contains 3 functional areas; **side navigation, the workflow manager** and...



the content editor (authors only).

Roles

The access permissions you are assigned are determined by your role in the Content Management System (CMS). There are 2 roles within the CMS, Author and Reviewer.

Author Role

The Author is responsible for editing existing web pages and creating new web pages within the CMS.

The author may:

- Edit existing web pages by creating a draft copy of the published page
- Create new web pages

Reviewer Role

The Reviewer is responsible for approving content that the author has edited or created.

The reviewer may:

- Approve and Publish content
- Reject content changes, which moves the page back to the author's draft stage

Stages

There are 3 workflow stages in the web content management system:

- Draft Stage - new or edited pages
- Approval Stage - pages waiting for approval by the reviewer
- Published Stage - pages that were approved by the reviewer and published to the website

Your web pages will be in one of the three stages. The stages are represented in the workflow manger as tabs. Click a tab to view a list of pages in the stage.



Draft Stage

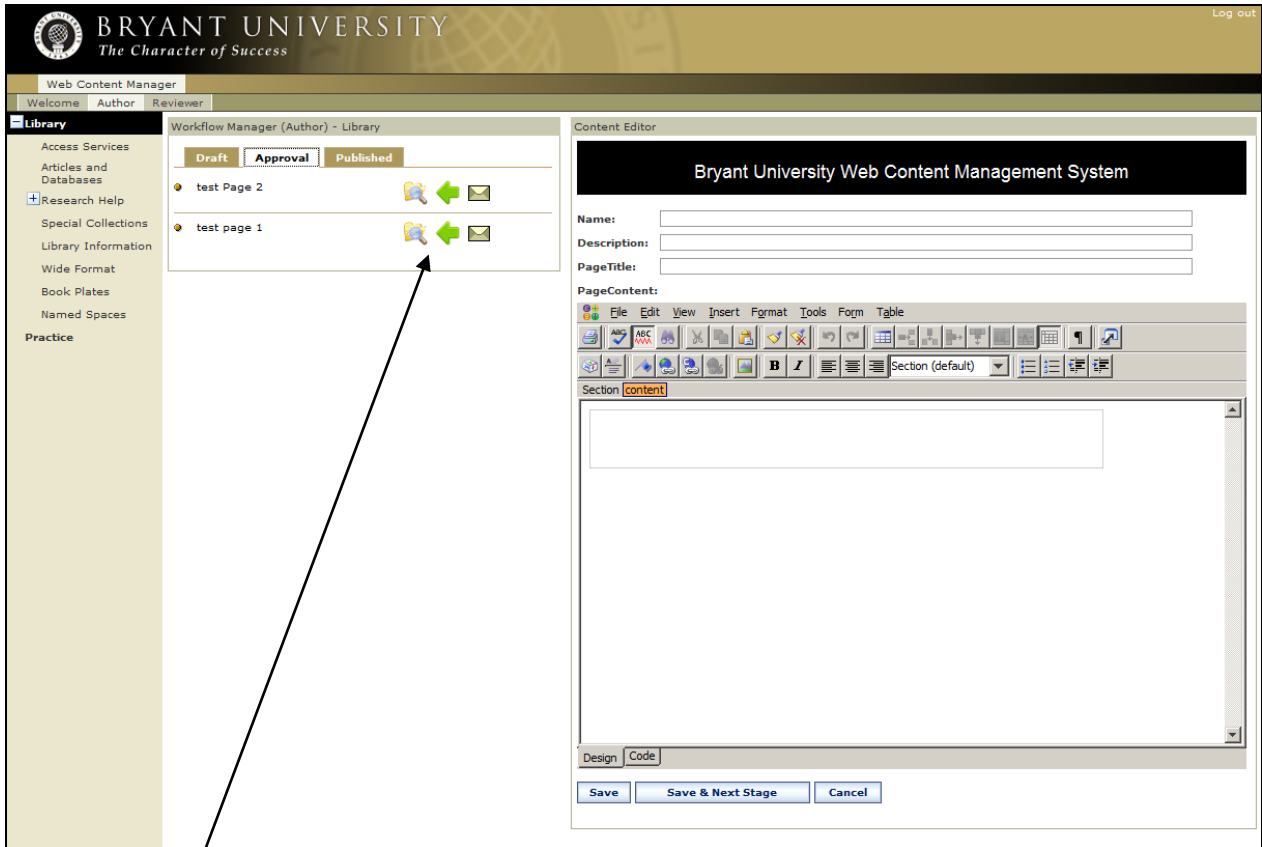
When content is new or in the process of being changed, it will be in the draft stage. After changes are complete, the author will move it to the next stage by clicking the "Send to Approval Stage" icon. The workflow manager shows the stage that the content is currently in:

Action	Icon	Effect
Preview		Clicking the Preview icon will display the web page in a new web browser window.
Edit		Opens the page in the content editor
Send to Approval Stage		Clicking this icon will send the web page to the approval stage.
Send Email		Opens a new mail message with the page title in the subject line.

Approval Stage

When content is ready to be reviewed, it will be in the approval stage.

The author and reviewer have different actions in this stage. The author will see the following action icons in the workflow pane:



Action

Icon

Effect

Preview



Clicking this icon will display the web page in a new web browser window.

Send Back to Draft Stage



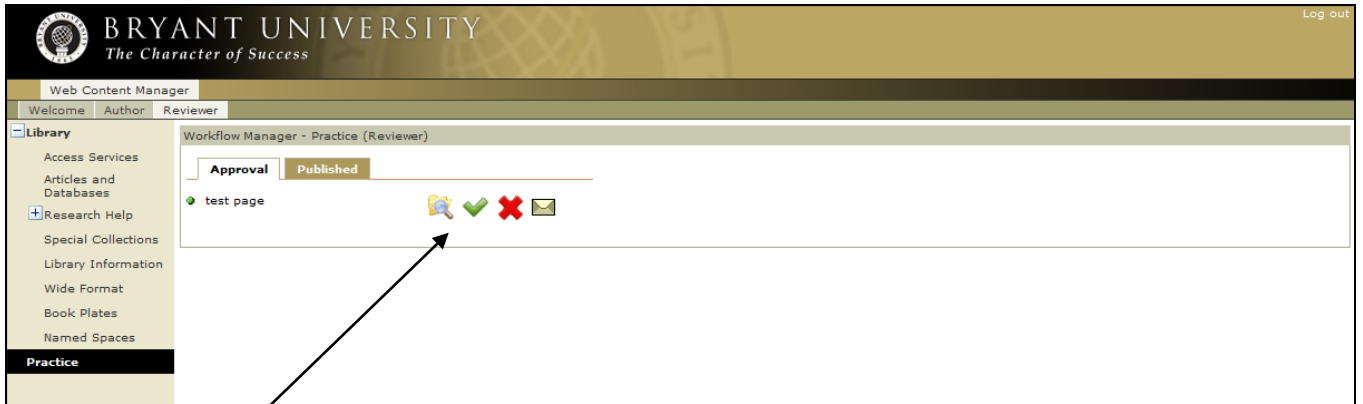
Clicking this icon will move the page back to the "Draft" stage so that it can be edited.





Send Email



Opens a new mail message with the page title in the subject line.






The reviewer will see the following action icons for each page waiting approval:



Action	Icon	Effect
Preview		Clicking on Preview will bring up the content in a new window as it would appear on the website. This is the “finished look” of the page.
Approve		Clicking on approve will immediately “publish” the content. The content will be made “live” (viewable) on the website and will be listed under the “Published” tab.
Reject		Clicking on reject will immediately move the page back to the author's draft stage. It will no longer be visible in the reviewer’s workflow manager until the author requests for it to be published again.
Send Email		Opens a new mail message with the page title in the subject line.

Published Stage

Content that is currently "live" (viewable) on the website is considered published.

Action	Icon	Effect
Preview		Clicking this icon will display the web page in a new web browser window.
Create Draft		Clicking this icon will create a "working copy" of the published page. This will allow you to edit the page without touching the published version. The working copy will replace the published version when the reviewer approves the update.
Cancel Draft		Clicking this icon will delete the draft copy. (this icon replaces the Create Draft icon after the draft is created)
Unpublish (remove from website)		Removes the page from the website and makes it a draft. (Use with caution. Improper use could result in broken links)
Send Email		Opens a new mail message with the page title in the subject line.

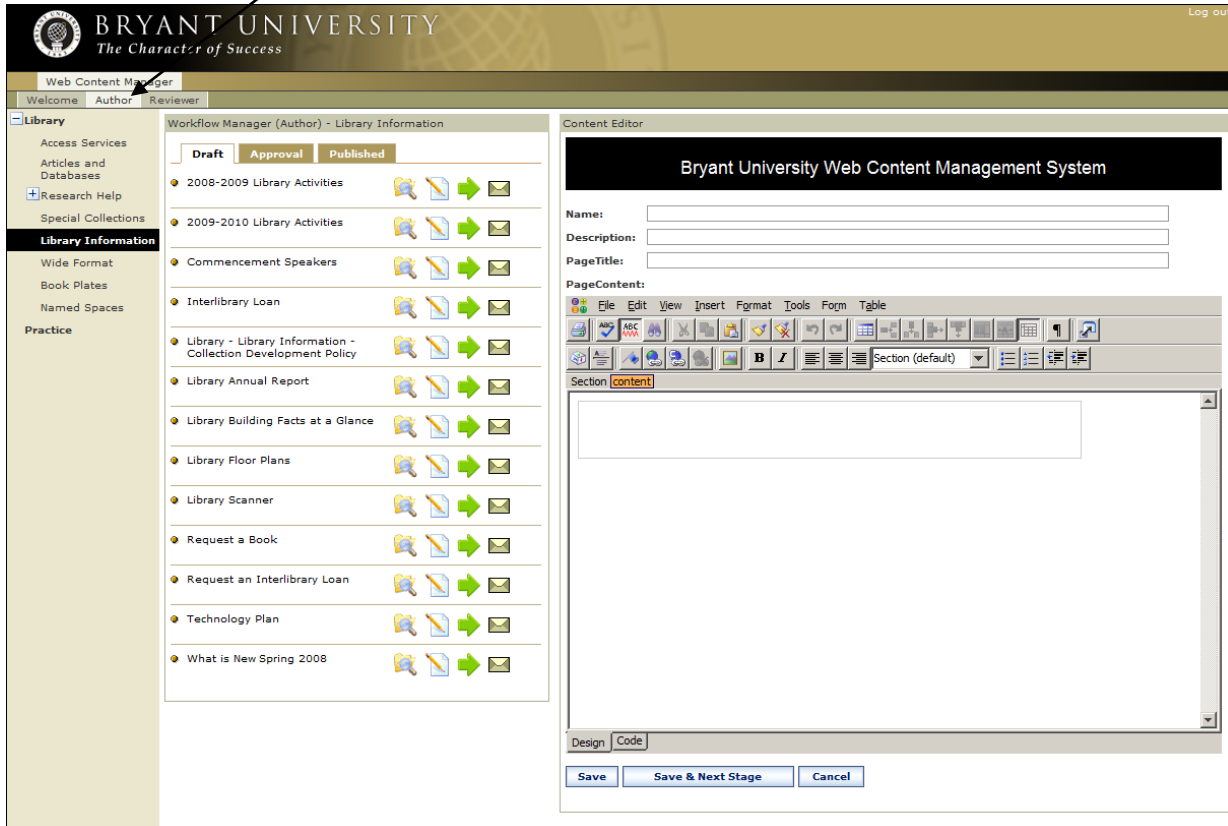
Glossary of Terms & Phrases

Approval Stage	The stage where web pages wait for approval by the reviewer. From here, web pages are published to the website.
Author	The person who creates and edits web pages.
Cancel	Exit out of editing a web page without saving changes.
Cancel Draft	Delete the draft copy for the web page.
Content Editor	The part of the web content management interface that allows for the updating of web pages.
Create Draft	Make a copy of a published in the draft stage. The published web page remains intact and unchanged.
Draft	The term used to describe a web page that is currently undergoing changes.
Draft Stage	The place where documents reside while undergoing changes.
Edit	To make changes to a web page.
Published Stage	The stage for web pages that are live on the website.
Published	The state of a web page that is live on the website
Preview	Displaying a web page in a web browser.
Reject Changes	Disapprove of the web page content and send the web page back to the draft stage.
Reviewer	The person responsible for approving the content on a web page
Save	Store the changes to a web page.
Save & Next Stage	Store the changes to a web page and send the page to the approval stage
Send Back to Draft Stage	When changes are needed, this icon will move the web page to the draft stage removing it from the website.

Author Role

Author Responsibility

The author is responsible for creating new web pages and making changes to existing pages. The author works under the “**Author**” tab of the interface. Once changes are completed, the author advances the web page to the reviewer for final approval.



Getting Started as an Author

The following figure shows the interface from the author's point of view. The author would click the "Edit" icon to load the page in the Content Editor. After changes are complete, the author will click the "Save" button, then click the "Send to Approval Stage" icon, and the content will then move to the approval stage and wait for the Reviewer to perform the next action. The author may also click the "Send & Next Stage" button to move the content to the approval stage with a single click. Or the "Cancel" button may be clicked if the author would like to discard any changes made to the page.

The screenshot displays the Bryant University Web Content Management System interface. On the left is a navigation menu with categories like Library, Access Services, and Library Information. The main area shows a 'Workflow Manager (Author) - Library Information' table with columns for Draft, Approval, and Published. Each row represents a page with icons for Edit, Save, and Send to Approval Stage. On the right is the 'Content Editor' window, which includes a header, form fields for Name, Description, and Page Title, a rich text editor toolbar, and a large text area. At the bottom of the editor are buttons for Save, Save & Next Stage, and Cancel. Callout boxes provide detailed descriptions for these elements.

Preview – Displays the web page in a browser.

Edit – Allows the web page to be changed. Opens the web page in the content editor

Send to Approval Stage – sends the page to the approval stage.

Email – Send email

Save – Saves the web page changes.

Save & Next Stage – Saves web page and moves it to the approval stage.

Cancel – Removes the web page from the editor and does not save any

Content Editor - The page is opened in the editor when the edit icon is clicked

What is a Draft?

Web pages under the Draft tab are either copies of existing web page or new/unpublished pages. The CMS allows for the modifying of a web page without affecting the live (viewable) web page until the user's updates are approved by the reviewer. Only one draft may exist for a web page at a time. Once pages are moved to the approval stage, they disappear from this view (draft tab). Click the Approval tab to see your pages awaiting approval by the reviewer.

What is Published?

Web pages under the Published tab are approved pages that are viewable (published) on the website. If a web page is moved to the Draft stage, they will disappear from the published list and appear under the Draft tab. This action will remove the page from the website.

How to Create a New Page

It is very easy to create new web pages in the CMS. Simply, enter a name for your page, enter the page content in the editor, and then click "Save". This will create a new web page and place it in the Draft stage. The only required field is the page name.

The screenshot displays the Bryant University Web Content Management System interface. The top navigation bar includes "Welcome", "Author", and "Reviewer" tabs. The main content area is divided into two panes. The left pane, titled "Workflow Manager (Author) - Library Information", shows a list of pages under the "Draft" tab, including items like "2008-2009 Library Activities" and "2009-2010 Library Activities". The right pane, titled "Content Editor", contains a form for creating a new page with fields for "Name:", "Description:", and "PageTitle:". Below these fields is a rich text editor with a toolbar and a large text area for "PageContent:". At the bottom of the editor are buttons for "Save", "Save & Next Stage", and "Cancel".

1 - Enter a name for the page

2 - Enter page content in the box

4 - The new page appears in the list

3 - Click the **Save** button

How to Preview a Page

Authors may preview web pages within the Draft, Approval or Published tabs. Simply click the **Preview** button and the web page will open in a new web browser window.

The screenshot displays the Bryant University Web Content Management System interface. At the top, the university logo and name are visible, along with a "Log out" link. Below the header, there are navigation tabs for "Welcome", "Author", and "Reviewer". The main area is divided into two sections: "Workflow Manager (Author) - Library Information" and "Content Editor".


The "Workflow Manager" section shows a list of items under the "Draft" tab. Each item has a "Preview" icon (a magnifying glass over a document) and a "Save" icon (a floppy disk). An arrow points to the "Preview" icon for the first item, "2008-2009 Library Activities".

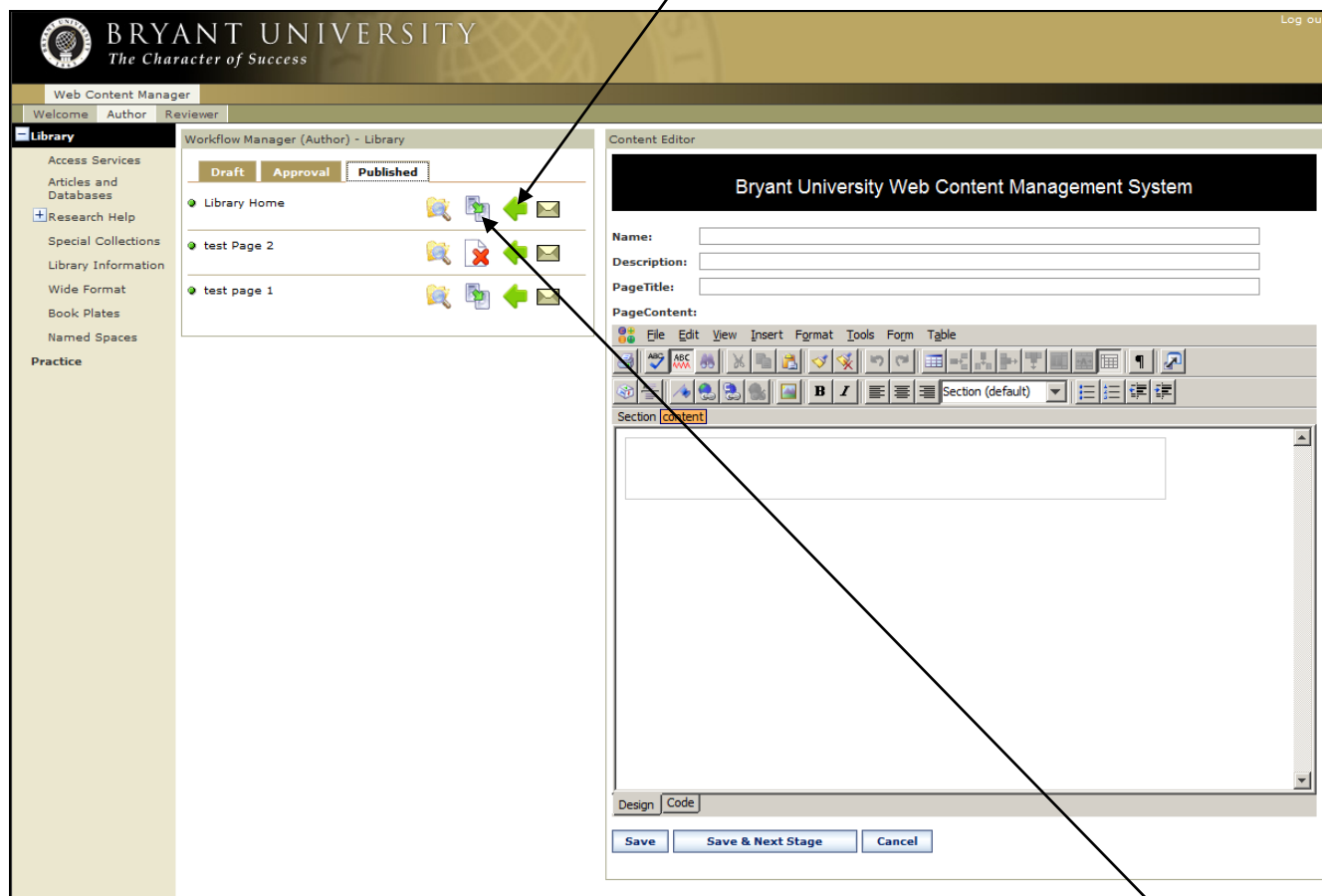
The "Content Editor" section is titled "Bryant University Web Content Management System" and contains a form with fields for "Name:", "Description:", and "PageTitle:". Below these fields is a "PageContent:" section with a rich text editor toolbar and a large text area for editing content. The toolbar includes options for "File", "Edit", "View", "Insert", "Format", "Tools", "Form", and "Table". The text area is currently empty.


At the bottom of the content editor, there are buttons for "Save", "Save & Next Stage", and "Cancel".


How to Edit an Existing Page

Web pages must be in the Draft stage for editing to take place. There are 2 ways to move a web page to the draft stage from the published stage.

The first is to click the **Unpublish** icon  under the Published tab. **This process removes the web page from the website until the update is approved by the reviewer (use with caution).**



The second, and recommended, way is to create a copy of the web page by clicking the  **Create Draft** icon. **This process keeps the web page viewable on the website while editing is taking place by making a copy of the published page.** The copy replaces the published page after the update has been approved by the reviewer.

When the Create Draft icon is clicked, and the copy is created, it is replaced with the **Cancel Draft** icon . Clicking this icon will delete the draft copy you created and allow you to start over.

How to Send a Page to the Approval Stage

When editing is done, the web page must be moved to the approval stage. This can be done by clicking the "Send to Approval" → icon to send the web page to the approval stage.

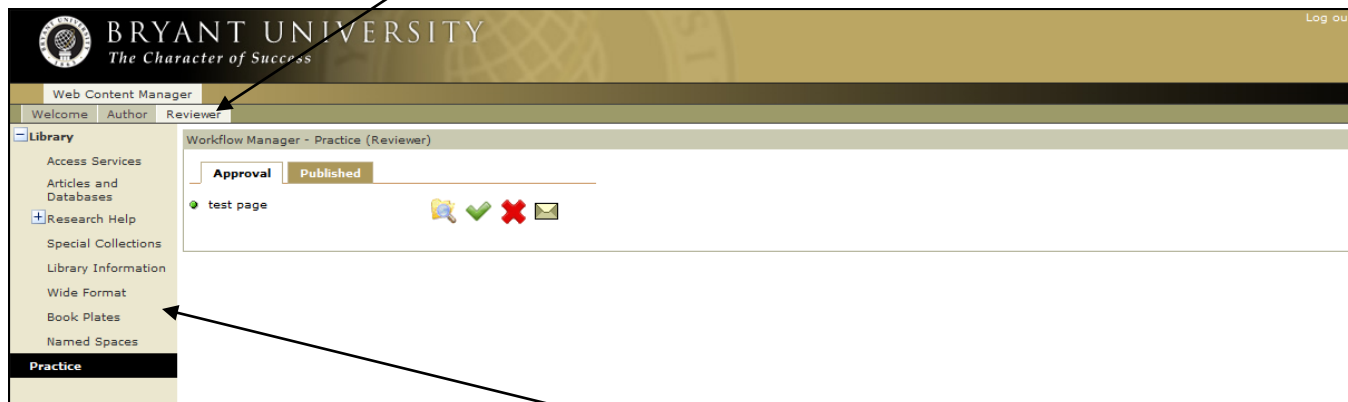
The screenshot displays the Bryant University Web Content Management System interface. The top navigation bar includes the university logo, name, and tagline, along with a 'Log out' link. Below this is a 'Web Content Manager' header with tabs for 'Welcome', 'Author', and 'Reviewer'. The main area is divided into two panels. The left panel, titled 'Workflow Manager (Author) - Library Information', shows a list of items with columns for 'Draft', 'Approval', and 'Published'. A green arrow points to the right-pointing arrow icon in the 'Approval' column for the first item, '2008-2009 Library Activities'. The right panel, titled 'Content Editor', contains a form for 'Bryant University Web Content Management System' with fields for 'Name:', 'Description:', and 'PageTitle:'. Below these is a rich text editor with a toolbar and a large text area. At the bottom of the editor, there are three buttons: 'Save', 'Save & Next Stage', and 'Cancel'. A second green arrow points to the 'Save & Next Stage' button.

The page can also be moved to the approval stage by clicking "Save & Next Stage" while the page is still in the editor.

Reviewer Role

Reviewer Responsibility

The reviewer is responsible for approving and rejecting updates made by an author. The reviewer works under the “**Reviewer**” tab of the interface.



After selecting the “**Reviewer**” tab you will see a navigation menu on the left hand side of the window. Prior to logging in to the system, you should be aware of the area for which you’ll be reviewing content (e.g. library, human resources, etc.).

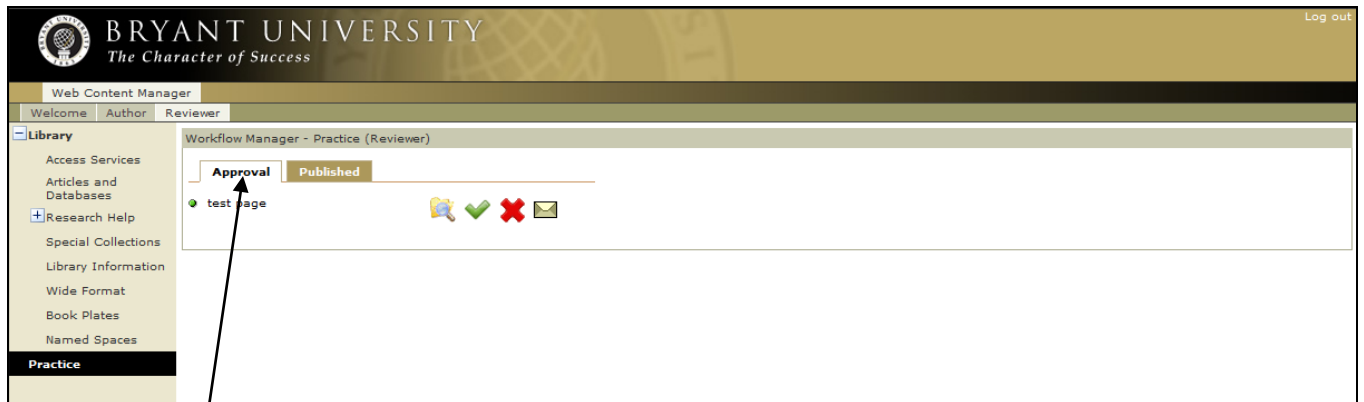
Using the navigation menu, click on the link corresponding to this area. If an area contains sub-areas of content, a plus/minus icon will appear to the left of the area’s name. Use this icon to expand the list for the area.

Workflow Manager





Upon accessing a site area as a Reviewer, you will be presented with the Workflow Manager. The workflow manager is your control panel for all operations as a content reviewer. From the Workflow Manager you will see all of the content associated with the current site area that is awaiting approval.

In general, there are two types of content listed and they correspond to the tabs across the top of the Workflow Manager pane. There is content that is “Waiting for Approval” and content that is “Published”. Content that is waiting for approval is content that an author has created and/or edited and is now requesting to be published on the website. Published content is content that has successfully gone through the approval process and is currently “live” (viewable) on the website.

Waiting for Approval

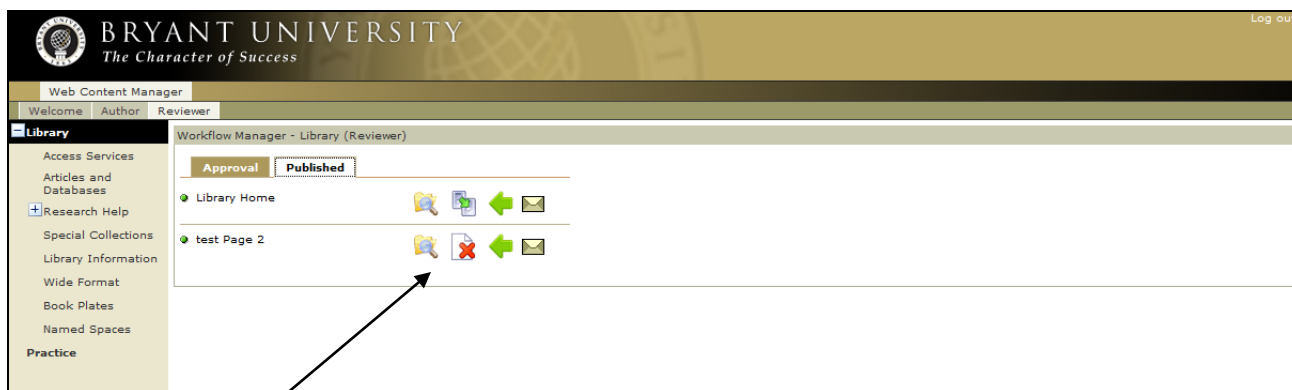







Under the “Approval” tab, content is listed by lines with four icons representing actions on the content. The reviewer’s choices are to **preview** the content, **approve** the content, **reject** the content, or **email** the content author.

Action	Icon	Effect
Preview		Clicking on Preview will bring up the content in a new window as it would appear on the website. This is the “finished look” of the page.
Approve		Clicking on approve will immediately “publish” the content. The content will be made “live” (viewable) on the website and will be listed under the “Published” tab.
Reject		Clicking on reject will immediately move the page back to the author's draft stage. It will no longer be visible in the reviewer’s workflow manager until the author requests for it to be published again.
Send Email		Opens a new mail message with the page title in the subject line.

Published

Under the “Published” tab, content is listed by lines with five icons representing actions on the content. The reviewer’s choices are **preview** the content, to **unpublish** the content, **create a draft** (working copy) of the content, or **email** the content author.



Action	Icon	Effect
Preview		Clicking on Preview will bring up the content in a new window as it would appear on the website. This is the “finished look” of the page.
Create Draft		Clicking on Create Draft will create a “working copy” of a piece of published content. This will allow for the editing/publishing of a “live” piece of content without disruption to that content during the editing process.
Cancel Draft		Clicking this icon will delete the draft copy. (this icon replaces the Create Draft icon after it is clicked)
Unpublish (remove from website)		Clicking the Unpublish icon will move the page back to the author's draft stage. It will no longer be visible in the reviewer’s workflow manager until the author requests for it to be published again.
Send Email		Opens a new mail message with the page title in the subject line.