State of Indiana
Content Management System
Open Text v.11.2.2

Training Manual
Version 1.0

Developed by

IN.gov

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1. Getting Started

1.1 Logging In

1. Open a browser window, Internet Explorer is optimal, but Chrome and Firefox work as well.
2. Type webcms11.in.gov in the address bar
3. The Open Text Web Site Management software opens with two fields for username and password
4. Enter your log-in credentials. These will either be your IOT credentials (computer, email) or credentials provided by IN.gov.
5. Select Start

OPEN TEXT
Web Site Management

Management Server 11.2 Build 11.2.2.1169

User name

Password

Start

1.2 OpenText Menu

The Open Text Menu is located on the top of the Homepage. Depending on authorizations and modules assigned, the menu items that are available will differ.

Homepage
Allows the user to monitor the changes that have been made to the site.

SmartEdit / Content Manager
Takes the user to the Start Page, to begin making changes

SmartTree / Content Manager
With proper permission, this will take the user to a tree view of the project, to begin making changes

Asset Manager
With proper permission, takes the user to the files and images repositories.

Tasks
Allows the user to review all recent changes to the site that need released and/or approved

Search
Allows the user to search all pages created in the project

Settings \ User Settings
Allows user to adjust account settings (if available)

Help
Access the Open Text Help system.

Log Off
Allows the user to successfully log off of the project

Project
   Drop down for accessing projects assigned to your account.

1.3 Selecting a Project

1. Once successfully logged in, select the Project drop down in the top right of the screen
2. Scroll to or select your project

Please Note: Project links display a green check if the user is already logged into the project.
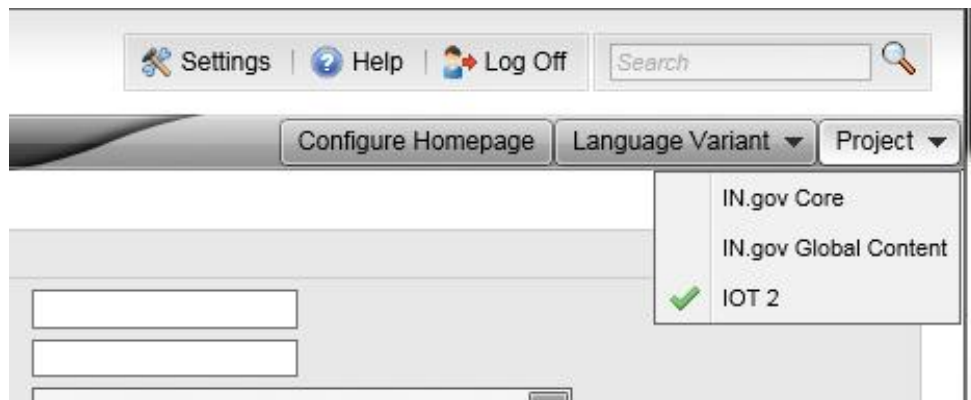
1.4 Start Page

1. Select Smart Edit from the Open Text menu to open the Start Page

The Start Page opens and contains links that include **Home Page** and **Utility Pages**

   Home Page: Select this link to begin editing the Agency's Website ③
   Utility Pages: This link is used exclusively by administrators.
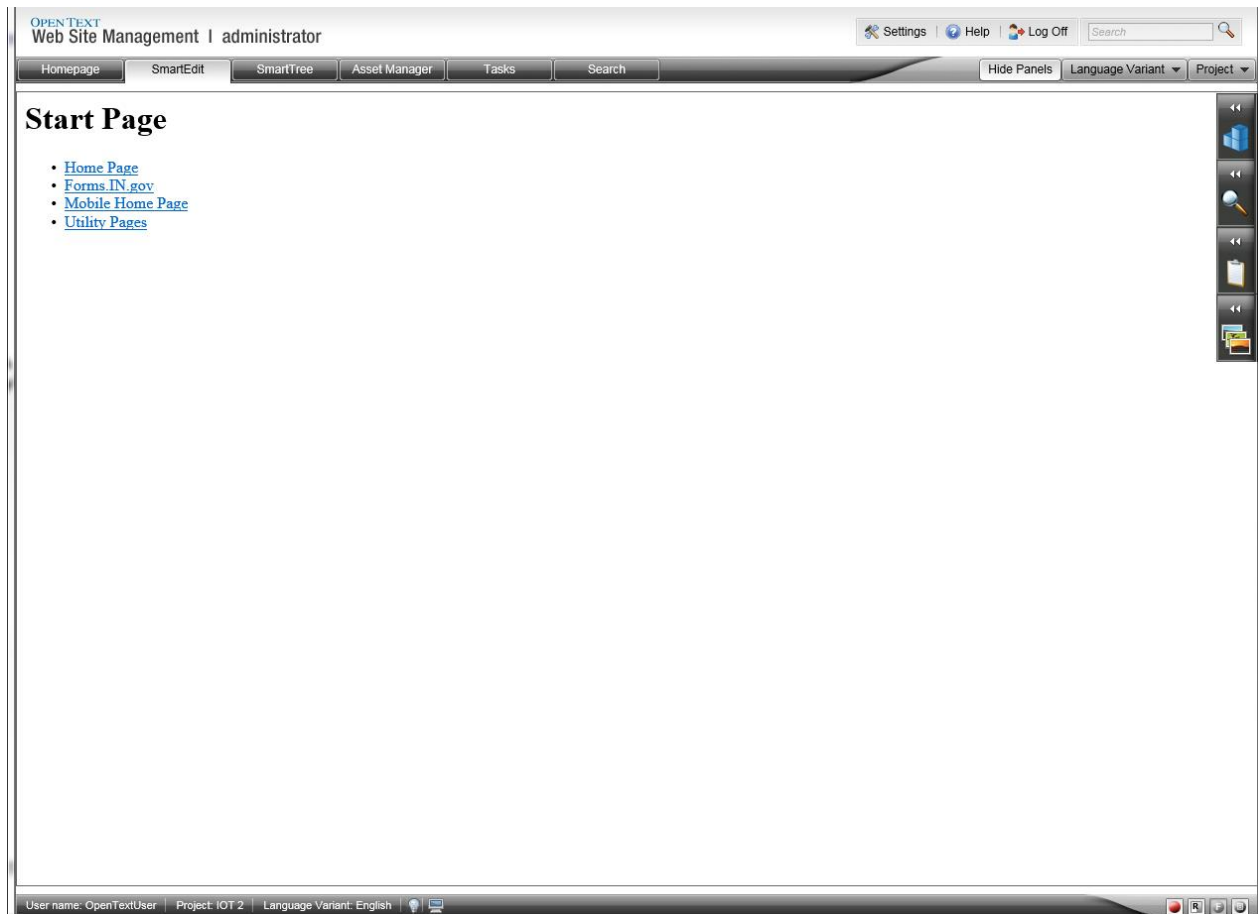
Once you click on Home Page (or the top link if named differently) you will be taken to the home page of your site where you can start navigating or editing.
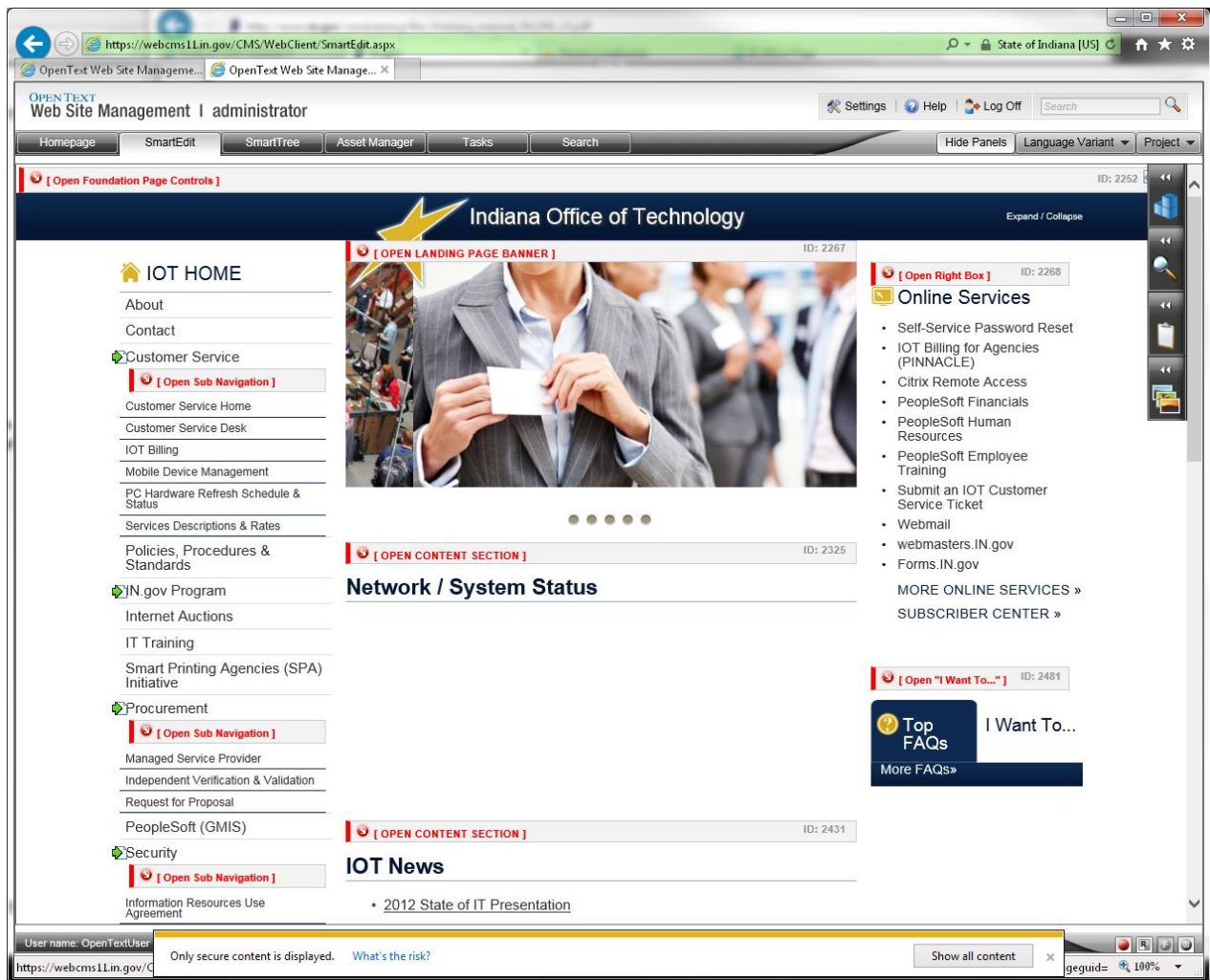
1.5 Creating a New Page (Child Page)

1. Locate the page to add a new link from.
2. Select Open Foundation Page Controls
3. Select Advanced Options
4. Select Manage Child Pages
5. The Edit Link Element Menu opens
6. Select Create and Connect Page
7. The Edit Headline Menu Opens

   STOP! Write down the 4-digit number that appears in the text box, this will be used later to create the link to the new page.

8. Type the title of the new page

9. Select OK
10.The page reappears
11.Select Edit Text Content
12.The Text Editor opens
13.Type the text of the new link in the text area
14.Highlight the word(s) to hyperlink
15.Select the Insert/Edit Link button (the globe icon with a chain link)
16.The Insert/Edit Link window opens
17.Select the Insert Link to Page button (the icon with a blank piece of paper)
18.The Page Search Menu opens
19.Select the green plus sign at the bottom to add more search criteria
20.Type the 4-digit number from Step 7
21.Select Start
22.The Search Results appear.
23.Select the title of the newly created page.
24.Select OK
25.Select OK (again)
26.The page reappears with the modifications
27.See Publishing a Single Change to publish the changes

2. The Text Editor

2.1 Editing Text Content

1. Navigate to the page the needs modified
2. Select Open Foundation Page Controls
3. Select Edit Text Content
4. The Text Editor opens
5. Insert/Edit content into the Text Editor
6. Optional - You can access the HTML code by selecting Source in the top right
7. Select OK
8. The page reappears with the modifications
9. See Publishing a Single Change to publish the changes

Please note: If the Text Editor does not contain any content, yet there is visible content on the page, refer to Managing Page Sections to make changes to the content.
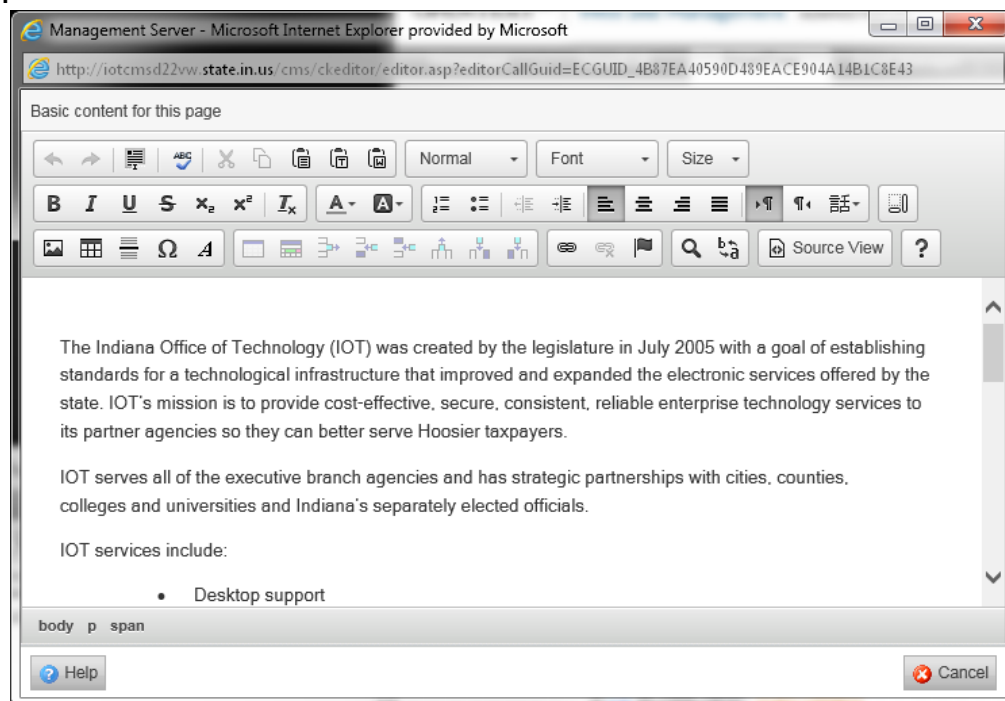
2.1

2.2 Linking Text to a URL

1. Navigate to the page that needs modified

2. Select the RedDot to the left page name and ID in the top left window
3. Select Edit Text Content
4. The Text Editor opens
5. Highlight the word(s) to use for the link
6. Select the Insert/Edit Link button (the icon with a chain link ⌗)
7. The Insert/Edit Link (image of chain) window opens
8. Set "Link type" as "URL"
9. Insert the Web Address into the "URL" input box
10. To open the link in a new tab, select the "Target" tab at the top of the window
11. Set the drop down to the desired function
12. Select OK
13. The page reappears with the modifications
14. See Publishing a Single Change to publish the changes
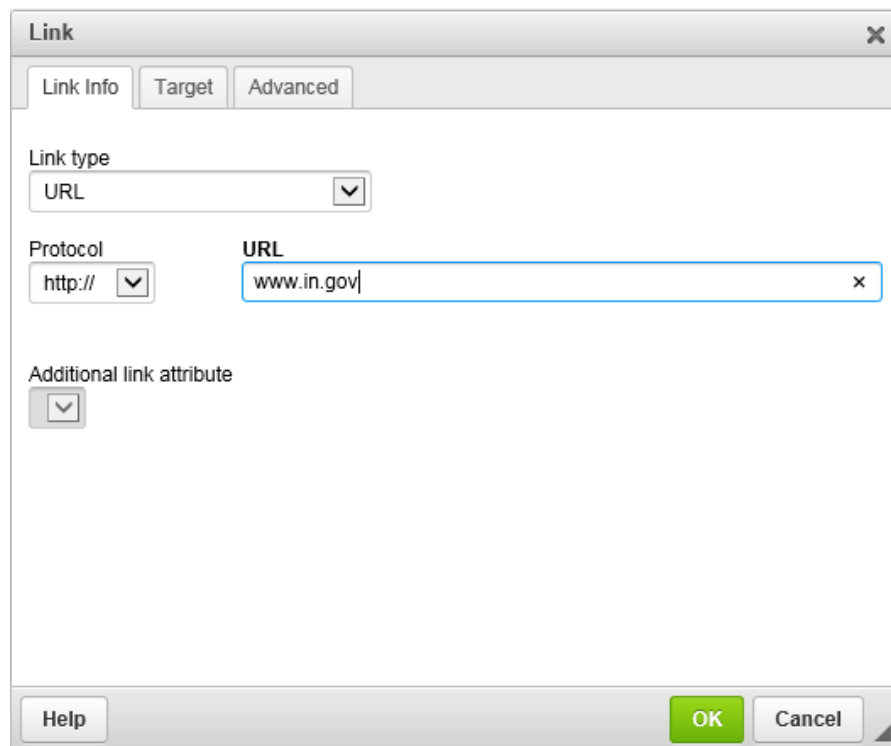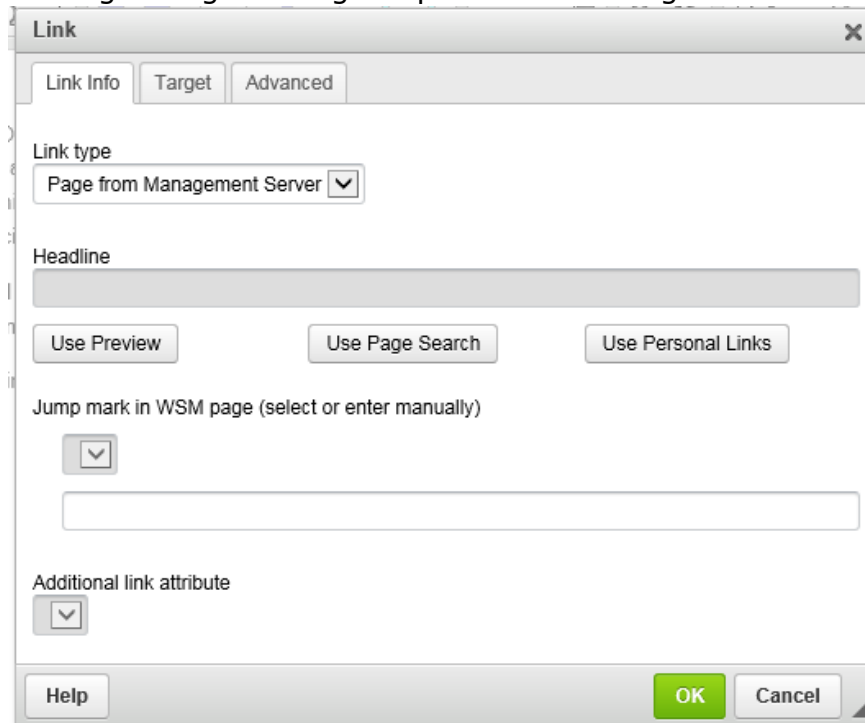
2.2

2.3 Linking Text to an Internal Page

1. Navigate to the page that needs modified
2. Select Open Foundation Page Controls
3. Select Edit Text Content

4. The Text Editor opens
5. Highlight the word(s) to use for the link
6. Select the Insert/Edit Link button (the icon with a chain link⊕)
7. The Insert/Edit Link (image of chain) window opens
8. Leave "Link type" as "Page from Management Server"
9. Select the "User Page Search" button
10. Search for the page to link to by typing the title in the Headline field, or add more search criteria and search by Page ID.
11. Select Start
12. The Search Results appear.
13. After locating the correct page, click on the page title
14. Select OK
15. Select OK (again)
16. The page reappears with the modifications
17. See Publishing a Single Change to publish the changes

2.3

2.4 Linking to an Existing Document

1. Navigate to the page that needs modified
2. Select the RedDot to the left page name and ID in the top left window
3. Select Edit Text Content
4. The Text Editor opens

5. Highlight the word(s) to use for the link
6. Select the Insert/Edit Link button (the icon with a chain link [icon])
7. The Insert/Edit Link (image of chain) window opens
8. Set "Link type" as "Asset from Management Server"
9. Select "Browse Server"
10. With "File" highlighted, select "OK"
11. The Asset Manager OpensU
12. Using the search function at the top of the window, begin typing the filename while leaving the asterisk (*) at the end, or type the complete filename and extension
13. Select the Search button
14. Preview the file by selecting the icon, or select the filename to view document information
15. After locating the correct file, click on the filename, and select OK
16. Select OK (again)
17. The page reappears with the modifications
18. See Publishing a Single Change to publish the changes

2.4

## 2.5 Linking to a New Document

1. Navigate to the page that needs modified
2. Select the RedDot to the left page name and ID in the top left window
3. Select Edit Text Content
4. The Text Editor opens
5. Highlight the word(s) to use for the link
6. Select the Insert/Edit Link button (the icon with a chain link 🔗)
7. The Insert/Edit Link (image of chain) window opens
8. Set "Link type" as "Asset from Management Server"
9. Select "Upload"
10. Select the Browse button
11. The Choose File dialog opens
12. Navigate to the Folder in which the file is currently located
13. Select the File
14. Select OK, and wait for the file to upload
15. Select OK
16. Select the folder to place the new document in (Files or Images)
17. Select OK
18. Select OK (again)
19. The page reappears with the modifications
20. See Publishing a Single Change to publish the changes
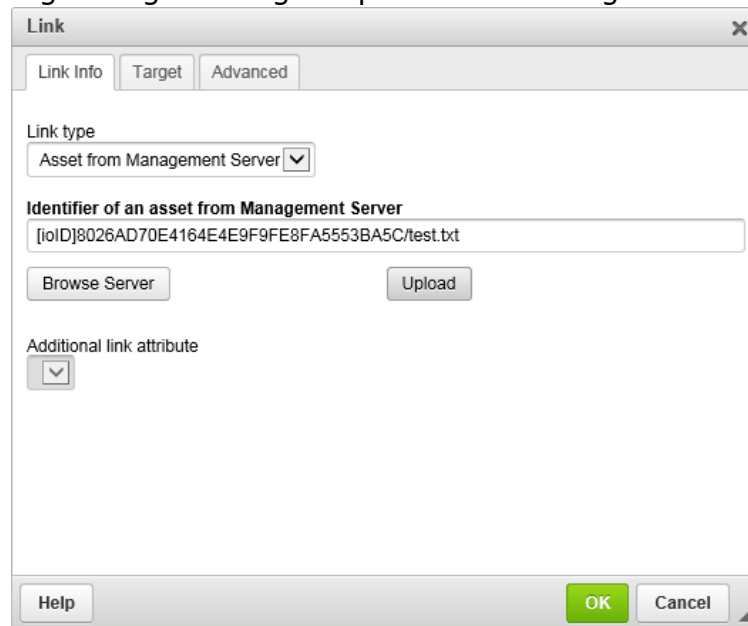
2.5

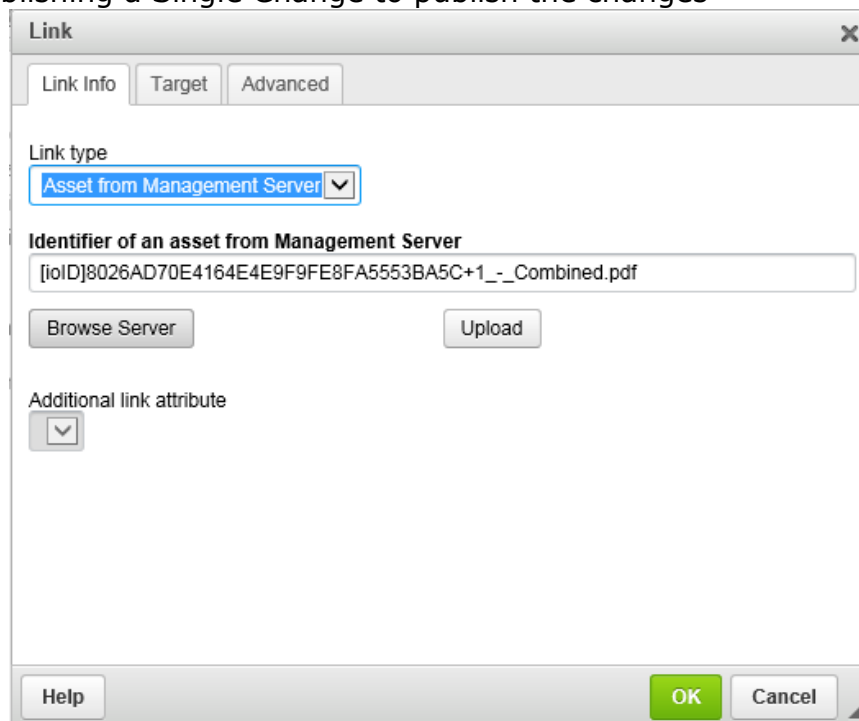## 2.6 Inserting Existing Images

1. Navigate to the page that needs modified
2. Select the RedDot to the left page name and ID in the top left window
3. Select Edit Text Content
4. The Text Editor opens
5. Set the cursor near where the image is to be placed
6. Select the Image button (bottom row, far left 🖼)
7. Select "Browse Server"
8. With "Images" highlighted, select "OK"
9. Select OK
10. The Asset Manager Opens
11. Using the search function at the top of the window, begin typing the filename while leaving the asterisk (*) at the end
12. Select the Search button
13. Preview the file by selecting the icon, or select the filename to view document information
14. After locating the correct file, click on the filename, and select OK
15. Enter a description in the "Alternative text" field
16. In this screen, you can adjust image size and alignment
17. Select OK
18. The text editor will appear with the new image
19. See Publishing a Single Change to publish the changes
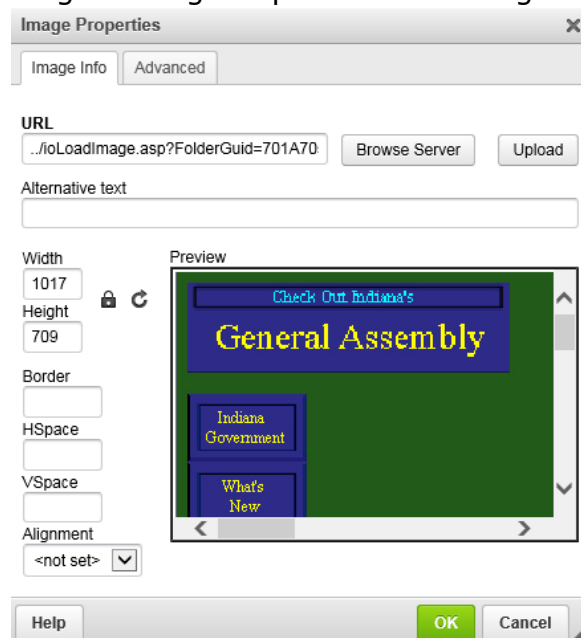
2.6

2.7 Inserting New Images

1. Navigate to the page that needs modified
2. Select the RedDot to the left page name and ID in the top left window
3. Select Edit Text Content
4. The Text Editor opens
5. Set the cursor near where the image is to be placed
6. Select the Image button (bottom row, far left 🖼)
7. Select "Upload"
8. Select the Browse button
9. The Choose File dialog opens
10. Navigate to the Folder in which the file is currently located
11. Select the Image
12. Select OK, and wait for the image to upload.
13. OK
14. Select the "Images" folder to place the new image in
15. OK
16. Enter a description in the "Alternative text" field
17. In this screen, you can adjust image size and alignment
18. Select OK
19. The Text Editor reappears
20. Select OK
21. See Publishing a Single Change to publish the changes

2.8 Editing Image Properties

1. After the image is inserted into the Text Editor, click the image once.
2. Select the Image button (bottom row, far left 🖼)
3. The Add Image / Image Properties Menu opens
4. Adjust "Alternative text" a brief description of the image, for every image used on the site. This is required for 508 Compliance.
5. Adjust the Height and Width of the image, using the lock icon can constrain your proportions. (You can also adjust the image size by scaling it in the text editor).
6. Insert a Border value to add a border around the image. Typically, a value of 0 or 1 is used.
7. Insert a HSpce/VSpace value to add padding on the top and bottom of the image. Typically, a value of 10 is used.
8. The "Alignment" options will place the image in respect to the page text.

Please Note: Preview the image changes by selecting the Preview button and reviewing the image in the Text Editor

3. Managing Page Sections

3.1 Editing Page Sections

Some agency sites utilize the Additional Content area. This area allows the user to store multiple page sections on a webpage.

1. Navigate to the page the needs modified
2. Select the Open Page Section
3. Select Edit Page Text
4. The Text Editor opens
5. Insert/Edit content in the Text Editor
6. Select OK
7. The page reappears with the modifications
8. See Publishing a Single Change to publish the changes

3.2 Adding Additional Page Sections

1. Navigate to the page that needs modified
2. Select Additional Content Quick Actions
3. Select Add Multiple Basic Content Elements
4. Type a name for the new page section
5. Select Create Sections
6. See Editing Additional Content Areas to add content

3.3 Rearranging Page Sections

1. Navigate to the page that contains the page sections
2. Select Open Foundation Page Controls link
3. Select Advanced Options link
4. Select Manage Additional Content Area
5. The Edit Link Element Menu opens
6. Select Edit Page Order
7. The Edit Page Order Menu Opens
8. Select the Page Section to move
9. Select the Down (or Up) Arrow to move the page section to the desired location
10. Select OK

11. The page reappears with the modifications
12. See Publishing a Single Change to publish the changes

3.4 Disconnecting Page Sections

1. Navigate to the page that contains the page sections
2. Select Open Foundation Page Controls link
3. Select Advanced Options link
4. Select Manage Additional Content Area link
5. The Edit Link Element Menu opens
6. Select Disconnect Page from List
7. The Disconnect Page from Link Menu opens
8. Select the Page Section to remove
9. Select OK
10. The page reappears with the modifications
11. See Publishing a Single Change to publish the changes

3.5 Adding a Link to an Outside URL in a Page Section

1. Navigate to the page the needs modified
2. Select Open Page Section
3. Select Manage List of Pages/URLs/Files
4. The Edit Link Element Menu opens
5. Select Create and Connect Page
6. The Content Class Groups Menu opens
7. In the top section, select Content Components [GLOBAL]
8. In the bottom section, select Link to a Page or URL
9. The Edit Headline Menu opens
10. Insert the text to use for the link into the text box
11. Select OK
12. The page reappears with the modifications
13. Locate the new link
14. Select Link to Page or URL, the red dot with an underscore (_)
15. The Edit Link Element Menu opens
16. Select the Assign URL link
17. The Assign URL Menu opens
18. Insert Web site Address into the text box (Include the http://)
19. Select OK
20. The page reappears with the modifications
21. Select the Tasks button on the left-side menu
22. The Select Tasks Menu opens

23. Select the 1 Edit Pages link
24. The Search Results Menu opens
25. Select the newly created link
26. Select the Submit Selected Pages to Workflow button.
27. See Publishing a Single Change to publish the changes

3.6 Adding a Link to an Internal Page in a Page Section

1. Navigate to the page the needs modified
2. Select Open Page Section
3. Select Manage List of Pages/URLs/Files
4. The Edit Link Element Menu opens
5. Select Create and Connect Page
6. The Content Class Groups Menu opens
7. In the top section, select Content Components [GLOBAL]
8. In the bottom section, select Link to a Page or URL
9. The Edit Headline Menu opens
10. Insert text to use for the link into the text box
11. Select OK
12. The page reappears with the modifications
13. Locate the new link
14. Select Link to Page or URL, the red dot with an underscore (_)
15. The Edit Link Element Menu opens
16. Select the Reference Page link
17. The Page Search Menu appears
18. Search for the page to link to by typing the title in the Headline field, or add more search criteria at the bottom and search by Page ID.
19. Select Start
20. The Search Results appear.
21. After locating the correct page, select the page title
22. The page reappears with the modifications
23. Select the Tasks button on the left-side menu
24. The Select Tasks Menu appears
25. Select the 1 Edit Pages link
26. The Search Results Menu opens
27. Select the newly created link
28. Select the Submit Selected Pages to Workflow button.
29. See Publishing a Single Change to publish the changes

3.7 Creating a New Page linked from a Page Section

1. Navigate to the page the needs modified
2. Select Open Page Section
3. Select Manage List of Pages/URLs/Files
4. The Edit Link Element Menu opens
5. Select Create and Connect Page
6. The Content Class Groups Menu opens
7. In the top section, select New - Foundation [GLOBAL]
8. In the bottom section, select Foundation (Main foundation template for all pages)
9. The Edit Headline Menu opens
10. Insert a title for the new page in the text box
11. Select OK
12. Select the Tasks button on the left-side menu
13. The Select Tasks Menu opens
14. Select the 1 Edit Pages link
15. The Search Results Menu opens
16. Select the newly created page
17. Select the Submit Selected Pages to Workflow button.
18. See Publishing a Single Change to publish the changes

Please Note: The new page will be published without any content. After following all of the steps above, see Editing Text Content to add content to the new page.

3.8 Adding a Link to a File in a Page Section

1. Navigate to the page the needs modified
2. Select Open Page Section
3. Select Manage List of Pages/URLs/Files
4. The Edit Link Element Menu opens
5. Select Create and Connect Page
6. The Content Class Groups Menu opens
7. In the top section, select Content Components [GLOBAL]
8. In the bottom section, select Link to a File
9. The Edit Headline Menu opens
10. Insert text to use for the link into the text box
11. Select OK
12. The page reappears with the modifications
13. Locate the new link
14. Select The File to Link To red dot next to the newly created
15. The Edit Media Element Menu opens
16. Select the Green Pencil

17. The Asset Manager Opens
18. Using the search function at the top of the window, begin typing the filename while leaving the asterisk (*) at the end
19. Select the Search button
20. Preview the file by selecting the icon, or select the filename to view document information
21. After locating the correct file, click on the filename, and select OK
22. The page reappears with the modifications
23. Select the Tasks button on the left-side menu
24. The Select Tasks Menu opens
25. Select the 1 Edit Pages link
26. The Search Results Menu opens
27. Select the newly created link
28. Select the Submit Selected Pages to Workflow button.
29. See Publishing a Single Change to publish the changes

Please Note: If linking to a file that is not listed in the Asset Manager, click Select from Local File System and locate the file to link to.

3.9 Rearranging Links in a Page Section

1. Navigate to the page the needs modified
2. Select Open Page Section
3. Select Manage List of Pages/URLs/Files
4. The Edit Link Element Menu opens
5. Select Edit Page Order
6. The Edit Page Order Menu opens
7. Select the Page Section to move
8. Select the Down (or Up) Arrow to move the link to the desired location
9. Select OK
10. The page reappears with the modifications
11. See Publishing a Single Change to publish the changes

3.10 Disconnecting Links in a Page Section

1. Navigate to the page the needs modified
2. Select Open Page Section
3. Select Manage List of Pages/URLs/Files
4. The Edit Link Element Menu opens
5. Select Disconnect Page from List
6. The Disconnect Page from Link Menu opens
7. Select the Page Section to remove

8. Select OK
9. The page reappears with the modifications
10. See Publishing a Single Change to publish the changes

4. Managing Online Services

4.1 Adding an Online Services to an Outside URL

1. Navigate to the Agency's front page
2. Select Open Right Box
3. Select Manage List of Services
4. The Edit Link Element Menu opens
5. Select the Create and Connect Page link
6. The Content Class Groups Menu opens
7. In the top Section, select Content Components [GLOBAL]
8. In the bottom Section, select Link to a Page or URL
9. The Edit Headline Menu opens
10. Insert the title of the Online Service into the text box
11. Select OK
12. The agency front page reappears
13. Locate the new link
14. Select Link to Page or URL, the red dot with an underscore (_)
15. The Edit Link Element Menu opens
16. Select the Assign URL link
17. The Assign URL Menu opens
18. Insert Web site Address into the text box (Include the http://)
19. Select OK
20. The agency front page reappears
21. See Publishing the Entire Site to publish the changes

4.2 Adding an Online Service to an Internal Page

1. Navigate to the Agency's front page
2. Select Open Right Box
3. Select Manage List of Services
4. The Edit Link Element Menu opens
5. Select the Create and Connect Page link
6. The Content Class Groups Menu opens
7. In the top Section, select Content Components [GLOBAL]
8. In the bottom Section, select Link to a Page or URL
9. The Edit Headline Menu opens
10. Insert the title of the Online Service into the text box

11. Select OK
12. The agency front page reappears
13. Locate the new link
14. Select Link to Page or URL, the red dot with an underscore (_)
15. The Edit Link Element Menu opens
16. Select the Reference Page link
17. The Page Search Menu opens
18. Search for the page to link to by typing the title in the Headline field, or add more search criteria at the bottom and search by Page ID.
19. Select Start
20. The Search Results appear.
21. Select the page to link to by selecting the page title.
22. The front page reappears
23. See Publishing the Entire Site to publish the changes

4.3 Adding an Online Service to a File

1. Navigate to the Agency's front page
2. Select Open Right Box
3. Select Manage List of Services
4. The Edit Link Element Menu opens
5. Select the Create and Connect Page link
6. The Content Class Groups Menu opens
7. In the top Section, select Content Components [GLOBAL]
8. In the bottom Section, select Link to File
9. The Edit Headline Menu opens
10. Insert the title of the Online Service into the text box
11. Select OK
12. The agency front page reappears
13. Locate the new link
14. Select The File to Link To red dot next to the newly created link
15. The Edit Media Element Menu opens
16. Select the Green Pencil
17. The Asset Manager Opens
18. Using the search function at the top of the window, begin typing the filename while leaving the asterisk (*) at the end
19. Select the Search button
20. Preview the file by selecting the icon, or select the filename to view document information
21. After locating the correct file, click on the filename, and select OK
22. The front page reappears
23. See Publishing the Entire Site to publish the changes

Please Note: If linking to a file that is not listed in the Asset Manager, click Select from Local File System and locate the file to link to.

4.4 Rearranging Online Services

1. Navigate to the Agency's front page
2. Select Open Right Box
3. Select Manage List of Services
4. The Edit Link Element Menu opens
5. Select Edit Page Order
6. The Edit Page Order Menu opens
7. Select the Online Service to move
8. Select the Down (or Up) Arrow to move the Widget to the desired location
9. Select OK
10. The front page reappears
11. See Publishing the Entire Site to publish the changes

4.5 Disconnecting Online Services

1. Navigate to the Agency's front page
2. Select Open Right Box
3. Select Manage List of Services
4. The Edit Link Element Menu opens
5. Select Disconnect Page from List
6. The Disconnect Pages from List Menu opensd
7. Select the Online Service to remove
8. Select OK
9. The front page reappears
10. See Publishing the Entire Site to publish the changes

5. Managing I Want To's

5.1 Adding a Link to an Internal Page

1. Navigate to the Agency's front page
2. Select Open I Want To…
3. Select Manage "I Want" list
4. The Edit Link Element Menu opens
5. Select the Create and Connect Page link
6. The Content Class Groups Menu opens
7. In the top Section, select Content Components [GLOBAL]
8. In the bottom Section, select Link to a Page or URL
9. The Edit Headline Menu opens
10. Insert text of the I Want To into the text box
11. Select OK
12. The agency front page reappears
13. Locate the new link
14. Select Link to Page or URL, the red dot with an underscore (_)
15. The Edit Link Element Menu opens
16. Select the Reference Page link
17. The Page Search Menu opens
18. Search for the page to link to by typing the title in the Headline field, or add more search criteria at the bottom and search by Page ID.
19. Select Start
20. The Search Results appear.
21. After locating the correct page, click the page title.
22. The front page reappears
23. See Publishing the Entire Site to publish the changes

5.2 Adding a Link to an Outside URL

1. Navigate to the Agency's front page
2. Select Open I Want To…
3. Select Manage "I Want" list
4. The Edit Link Element Menu opens
5. Select the Create and Connect Page link
6. The Content Class Groups Menu opens
7. In the top Section, select Content Components [GLOBAL]

8. In the bottom Section, select Link to a Page or URL
9. The Edit Headline Menu opens
10. Insert text of the I Want To into the text box
11. Select OK
12. The agency front page reappears
13. Locate the new link
14. Select Link to Page or URL, the red dot with an underscore (_)
15. The Edit Link Element Menu opens
16. Select the Assign URL link
17. The Assign URL Menu opens
18. Insert Web site Address into the text box (Include the http://)
19. Select OK
20. The agency front page reappears
21. See Publishing the Entire Site to publish the changes

5.3 Adding a Link to a File

1. Navigate to the Agency's front page
2. Select Open I Want To…
3. Select Manage "I Want" list
4. The Edit Link Element Menu opens
5. Select the Create and Connect Page link
6. The Content Class Groups Menu opens
7. In the top Section, select Content Components [GLOBAL]
8. In the bottom Section, select Link to File
9. The Edit Headline Menu opens
10. Insert text of the I Want To into the text box
11. Select OK
12. The agency front page reappears
13. Select The File to Link To red dot next to the newly created link
14. The Edit Media Element Menu opens
15. Select the Green Pencil
16. The Asset Manager Opens
17. Use the search function at the top of the window, begin typing the filename while leaving the asterisk (*) at the end
18. Select the Search button
19. Preview the file by selecting the icon, or select the filename to view document information
20. After locating the correct file, click on the filename, and select OK
21. The front page reappears
22. See Publishing the Entire Site to publish the changes

Please Note: If linking to a file that is not listed in the Asset Manager, click Select from Local File System in the Asset Manager and locate the file link to.

5.4 Rearranging I Want To's

1. Navigate to the Agency's front page
2. Select Open I Want To…
3. Select Manage "I Want" list
4. The Edit Link Element Menu opens
5. Select Edit Page Order
6. The Edit Page Order Menu opens
7. Select the I Want To to move
8. Select the Down (or Up) Arrow to move the Widget to the desired location
9. Select OK
10. The front page reappears
11. See Publishing the Entire Site to publish the changes

5.5 Disconnecting I Want To's

1. Navigate to the Agency's front page
2. Select Open I Want To…
3. Select Manage "I Want" list
4. The Edit Link Element Menu opens
5. Select Disconnect Page from List
6. The Disconnect Pages from List Menu opens
7. Select the I Want to to remove
8. Select OK
9. The front page reappears
10. See Publishing the Entire Site to publish the changes

6. Managing Widgets

In order to maintain IN.gov's Design Standards, submit a request for a new widget to http://webmasters.in.gov. Please include a detailed description of the widget as well as any artwork the widget will contain.

7. Managing Left Navigation Items

7.1 Adding Tier 1 Left Navigation Items

A lot of thought and planning went into each agency's left navigation. Please contact your department head and get prior approval.

1. Navigate to the Agency's front page
2. Select Open Foundation Page Controls
3. Select Manage Main Navigation
4. The Edit Link Element Menu opens
5. Select Create and Connect page
6. The Content Class Groups Menu opens
7. In the top section, select Foundation [GLOBAL]
8. In the bottom section, select Foundation (Main foundation template for all pages)
9. Type the left navigation link name
10. Select OK
11. The front page reappears
12. See Rearranging Tier 1 Left Navigation Items to move the item to the appropriate position
13. See Publishing the Entire Site to publish the changes

7.2 Adding Tier 1 Left Navigation Items with Dropdowns

A lot of thought and planning went into each agency's left navigation. Please contact your department head and get prior approval.

1. Navigate to the Agency's front page
2. Select Open Foundation Page Controls
3. Select Manage Main Navigation
4. The Edit Link Element Menu opens
5. Select Create and Connect page
6. The Content Class Groups menu opens
7. In the top section, select Foundation [GLOBAL]
8. In the bottom section, select Foundation (Main foundation template for all pages)
9. Type the left navigation link name
10. Select OK

11. The front page reappears
12. Select the newly created Tier 1
13. Select Open Foundation Page Controls
14. Select Add Sub Navigation
15. The Edit Link Element menu opens
16. Select Create and Connect page
17. The Content Class Groups Menu opens
18. In the top section, select Structural Components [GLOBAL]
19. In the bottom section, select Sub Navigation
20. Select OK
21. The page reappears
22. Select Manage Sub Navigation
23. The Edit Link Element Menu opens
24. Select Create and Connect Page
25. The Edit Headline Menu opens
26. Type the text for the new Tier 2 link
27. Select OK
28. The front page reappears
29. Select the newly created Tier 1
30. Select the newly created Tier 2
31. See Editing Text Fields to add content
32. See Rearranging Tier 2 Left Navigation Items to move the item to the appropriate position
33. See Publishing the Entire Site to publish the changes

7.3 Rearranging Tier 1 Left Navigation Items

A lot of thought and planning went into each agency's left navigation. Please contact your department head and get prior approval.

1. Navigate to the Agency's front page
2. Select Open Foundation Page Controls
3. Select Manage Main Navigation
4. The Edit Link Element Menu opens
5. Select Edit Page Order
6. The Edit Page Order Menu opens
7. Select the Left Navigation Item to move
8. Select the Down (or Up) Arrow to move the Left Navigation Item to the desired location
9. Select OK
10. The front page reappears
11. See Publishing the Entire Site to publish the changes

7.4 Adding Tier 2 Left Navigation Items

A lot of thought and planning went into each agency's left navigation. Please contact your department head and get prior approval.

1. Navigate to the Agency's front page
2. Locate the Tier 1 link that includes the dropdown to modify
3. Select Open Sub Navigation
4. Select Manage Sub Navigation
5. The Edit Link Element Menu opens
6. Select Create and Connect Page
7. The Edit Headline Menu opens
8. Type the text for the new Tier 2 link
9. Select OK
10. The front page reappears
11. See Rearranging Tier 2 Left Navigation Items to move the item to the appropriate position
12. See Publishing the Entire Site to publish the changes

7.5 Rearranging Tier 2 Left Navigation Items

A lot of thought and planning went into each agency's left navigation. Please contact your department head and get prior approval.

1. Navigate to the Agency's front page
2. Locate the Tier 1 link that includes the dropdown to modify
3. Select Open Sub Navigation
4. Select Manage Sub Navigation
5. The Edit Link Element Menu opens
6. Select Edit Page Order
7. The Edit Page Order Menu opens
8. Select the Left Navigation Item to move
9. Select the Down (or Up) Arrow to move the Left Navigation Item to desired location
10. Select OK
11. The front page reappears
12. See Publishing the Entire Site to publish the changes

8. Releasing/Publishing

8.1 Publishing a Single Change

1. Finish making the change
2. With Open Foundation Page Controls open, right click in the content area to access the Actions
3. The Page Actions Menu opens
4. Select Submit Page to Workflow
5. Right click in the content area to access the Actions
6. The Page Actions Menu opens
7. Select the Publish Page link
8. DO NOT select the Publish all following checkbox or Publish Related
9. Select HTML_APACHE_PROD or HTML_APACHE_TEST
10. Select OK

Please Note: If you do not see Publish Page on Step 7, your agency has a workflow in use. At this point, select Submit Page to Workflow and you are finished. It will be up to the approver to accept the change and publish.


8.2 Publishing the Entire Project

There are two reasons why you would need two publish the entire project.

- You make a change to the left or right navigation areas, or
- You make multiple changes across the entire site

If you have performed either of the above, follow these steps:

1. Finish making the change(s)
2. Navigate to the Agency's front page
3. Select the Tasks button on the top menu
4. The Select Tasks Menu opens
5. Open Relases
6. Open Pages Waiting for Release (#)
7. Select English
8. Right click the resulting page to the right
9. Select Release
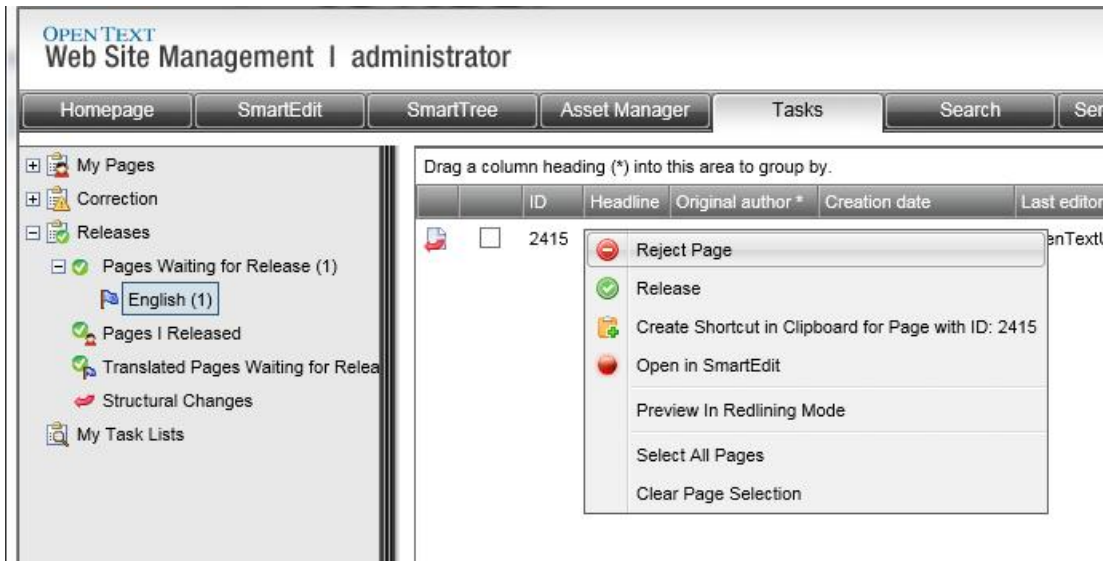
10. Select Smart Edit in the top menu
11. Select Home page
12. Select Open Foundation Page Controls
13. Right click in the content section
12. Select the Publish Page link
13. Select Publish all following pages, and Publish related pages
14. Select HTML_APACHE_PROD and HTML_APACHE_TEST
15. Select OK

9. Search

9.1 Search for Page

1. Select Search from top menu
2. Select Edit Search if not options show.
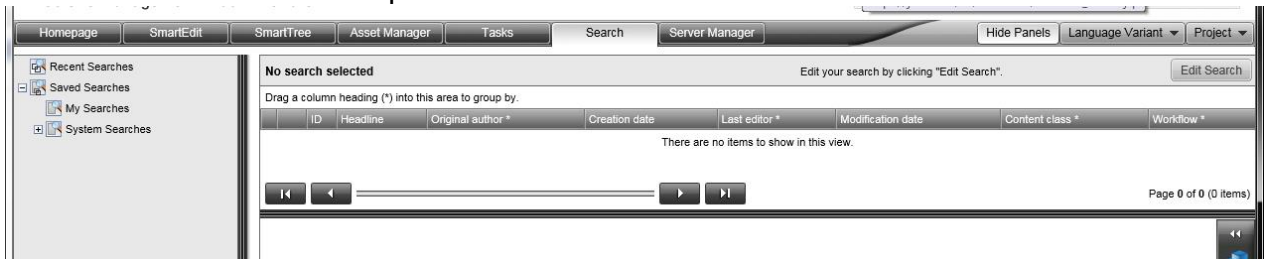
3. Use the Search criteria drop down to select your search method
4. Input your search criteria in the field
5. Select Run Search
6. Your page information should appear below
7. Hover over the page information then right click
8. Select Create Shortcut in Clipboard to store the page in your clipboard, or select Open in SmartEdit to begin editing the page
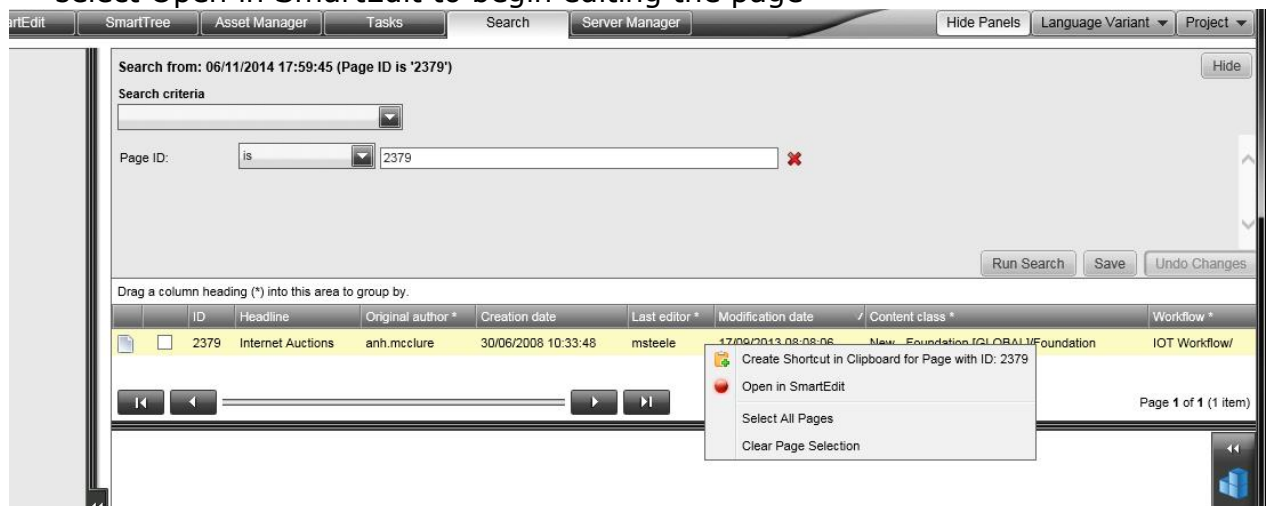
10. Panels

Panels are located in the right side of your SmartEdit Screen, You may need to select Display Panels.

10.1 Content Classes panel
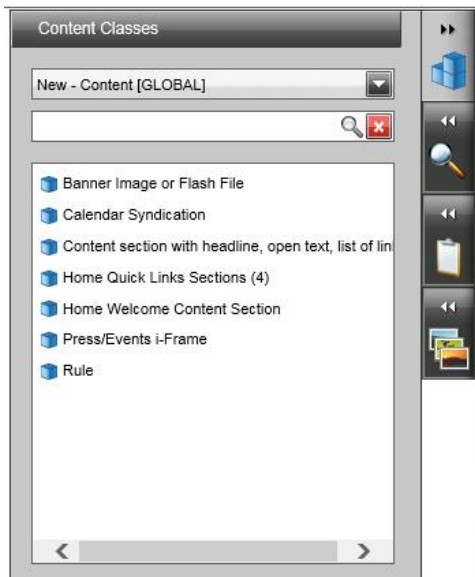
Using the Content Classes panel, you can create a new page by dragging a content class or a page definition to the RedDot symbol of a structural element. A new page is then created based on the selected content class and connected to the structural element. If you have selected a page definition, multiple pages are created accordingly.

When displaying the content classes and page definitions in the panel, you have the following options:

• **Switch content class folder** - The panel displays only those content classes and page definitions that are in one content class folder. Using the drop-down list at the top of the panel, you can switch the content class folder.

• **Filter content classes** - Enter a term in the box and click the symbol. The panel now displays only those content classes or page definitions whose name contains the term entered. All other content classes and page definitions are hidden.

• **Delete filter** - Deletes the term entered in the box. All the content classes and page definitions of the selected content class folder are displayed again.

• **Content class information** - If a description or a preview symbol has been defined for a content class, this information is displayed when you place the pointer over the content class name.

10.2 Page Search panel
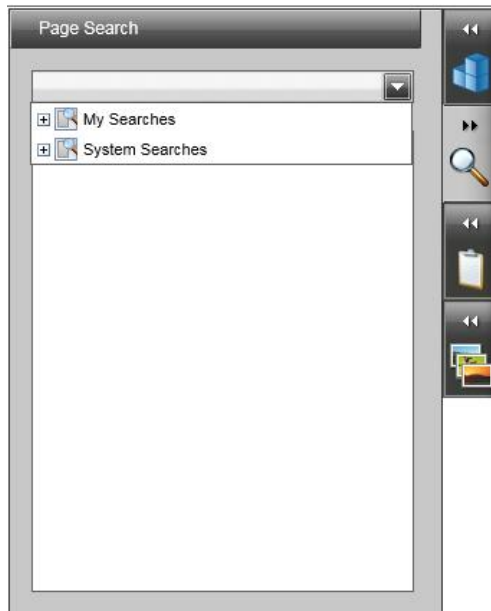
The Page Search panel lets you run saved searches that were defined in the Search module. The search result is then displayed in the panel. You can move the listed pages to the RedDot of a structural element using the drag-and-drop function. The page is then connected to the structural element. You can also jump directly to the pages in the search result.

You have the following options in the Page Search panel:

• **Select Saved Search** - In the drop-down list, select the folder where the search was saved and then select the desired search. The search is executed and the result is shown in the panel.

• **Open Page** - This symbol lets you open the respective page directly in SmartEdit.

10.3 Clipboard panel
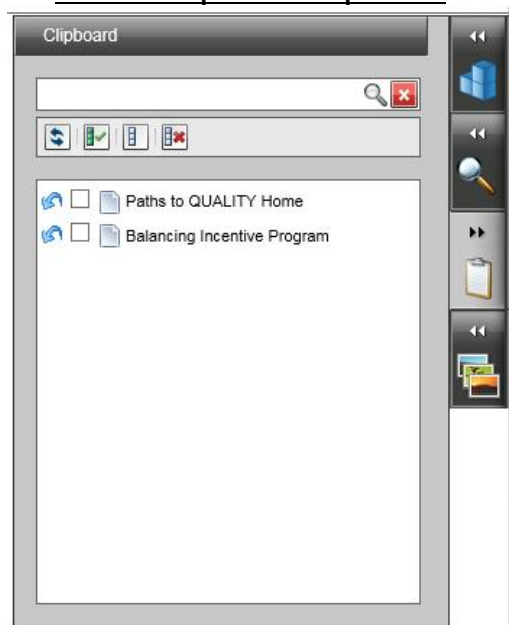
Clipboard in SmartEdit lets you connect pages with structural elements using the drag-and-drop function. You can also jump directly to the pages in Clipboard. In contrast to *SmartTree* and *Server Manager*, Clipboard in SmartEdit only displays pages and does not display other objects such as elements.

You have the following options for displaying pages in Clipboard:

• **Filter** - Enter a term in the box and click the symbol. Only pages that contain the term that you entered here are displayed in Clipboard. All other pages are then hidden but are not permanently deleted from Clipboard.

• **Remove Filter** - Clears the term entered in the box. All pages in Clipboard are displayed again.
• **Refresh Clipboard** - Refreshes the Clipboard display. If, for example, you have changed the headlines of pages in Clipboard, the new headlines are displayed after you refresh Clipboard.
• **Select All** - Selects all pages in Clipboard.
• **Clear Selection** - Removes the page selection.
• **Remove Selected Entries** - Removes all of the selected pages from Clipboard.
• **Open Page** - Opens the respective page directly in SmartEdit.
Notes Creating shortcuts in Clipboard
You can create shortcuts in Clipboard for pages in other modules to be able to edit these pages in SmartEdit or SmartTree. Only pages are displayed in
Clipboard in SmartEdit. If, for example, you move a structural element to Clipboard in SmartTree, it is not available for selection in SmartEdit.
To create a shortcut for a page in Clipboard, use the *Create Shortcut in Clipboard* action. This action is only available in the following modules:
• **SmartEdit** - In a page's shortcut menu or when you right-click the page in the structural area. If you have defined drop areas, you can also double-click the drag header. For more information about the drag header and drop areas.
• **SmartTree** - In a page's *Action Menu* (or double-click the page in the *project structure*)
• **Homepage** - In a page's shortcut menu in a tasks widget.
• **Search module** - In a page's shortcut menu in the list view.
• **Tasks module** - In a page's shortcut menu in the list view.

10.4 Asset panel

Asset Panel enables you to do the following:

- Search for images that are stored in Asset Manager folders.
- Drag images from Asset Panel to Image or Media elements in SmartEdit.
- Edit selected images in Asset Editor.