i3SiteTools Content Management Guide

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Introduction

Welcome to **i3SiteTools**, site management made simple. At Digital Positions, we have a passion for the Internet and for developing its unlimited potential to deliver information for folks like you. After years of developing web sites, we came to realize that business users needed a way to manage their own web site content without being held hostage by someone in the IT department, or having to go back to school for a computer science degree just because they want to add a press release to their home page.

i3SiteTools is the realization of this simple idea. Able to run in all of the major browsers on both MAC and Windows Operating systems, **i3SiteTools** is a complete site management solution empowering you to completely manage the content on your site from anywhere you have Internet access.

This guide along with some additional video tutorials will teach you everything you need to know to get up and running.

Why Do I Need **i3SiteTools**?

Anyone can have a web site these days -- in fact the Web is overrun with sites on any topic you can possibly imagine. A startling majority of these sites have content that is poorly formatted, out of date or simply inaccurate. It's a safe bet that the majority of the content on these sites is entirely beyond the control of the person who created it and even if they wanted to change it they cannot. Web sites suffering from this common problem can actually do more harm than if a company had no web site at all. **i3SiteTools** allows non-technical users to easily manage the content on their site keeping it accurate, relevant and timely.

What is Dynamic Content?

When we talk about *static* web sites such as those discussed in the previous section, we are referring to sites where the actual content (text, images, flash, video, etc.) is hard-coded, or embedded into an HTML page. There are no re-useable elements and the pages are simply static files sitting out on the web server loosely connected by some hard-coded links. In order to modify this content, you must download the HTML file and edit the actual mark-up code, then re-upload it to the server. Common template components such as navigation are not shared between pages and must be manually pasted into every single page on the site any time even the most minor change is made.

i3SiteTools liberates you from this impossible tedium by using a concept called *dynamic content.* Dynamic Content is content that is stored in a central database and is plugged into HTML templates on the fly every time a site visitor views a web page. Separating the data, or content from the display solves a few key problems:

Content that is used in multiple places across the site can be edited at a single source.

Content can be displayed and formatted in an unlimited number of ways without having to change the source content.

Content stored in a database makes it portable and platform independent.

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Getting Started

Your Digital Positions project manager will supply you with a web address to log in to your **i3SiteTools** installation along with your username and password. Typically your site will be developed on one of our internal development servers and the address you will be given will look something like this: **http://dp06xxx.d-p.com/admintools/**. Keep the email you receive with this information somewhere that you can easily retrieve it.

Technical Requirements

To insure optimal performance, **i3SiteTools** requires the following minimum versions (if you have a new version you are ok):

Windows 2000 or Windows XP (SP2) or higher version	Macintosh OS X or higher version
Internet Explorer 6.x	No version of IE is supported for the tools
FireFox 1.5.x Mozilla Suite 1.7.x	FireFox 1.5.x Mozilla Suite 1.7.x
Netscape 7.1.x	Netscape 7.1.x

Minimal Screen Resolution of 800 x 600 but best viewed at 1024 x 768

Insure that JavaScript is enabled

Insure that page caching is turned off in your browser preferences. "Check for a new version every visit to the page" is what you want. Failure to make this change will cause **i3SiteTools** to not reset when moving between tools. Typically if you are in one tool and then go to a different tool and begin work in this new tool, at some point you will be taken back to the previous tool instead of remaining in the new tool.

Flash Player 7+ plug-in available for download here: http://www.macromedia.com/go/getflashplayer

It is highly recommended, though not required that you have high-speed Internet access when using the tools.

Insure that if you have pop-up blocker software installed, that it allows pop-ups for the domain of your **i3SiteTools** installation and/or *.d-p.com.

Logging In

Once you type the address into the location bar of your browser and hit 'enter', you should be presented with a screen like the one below.

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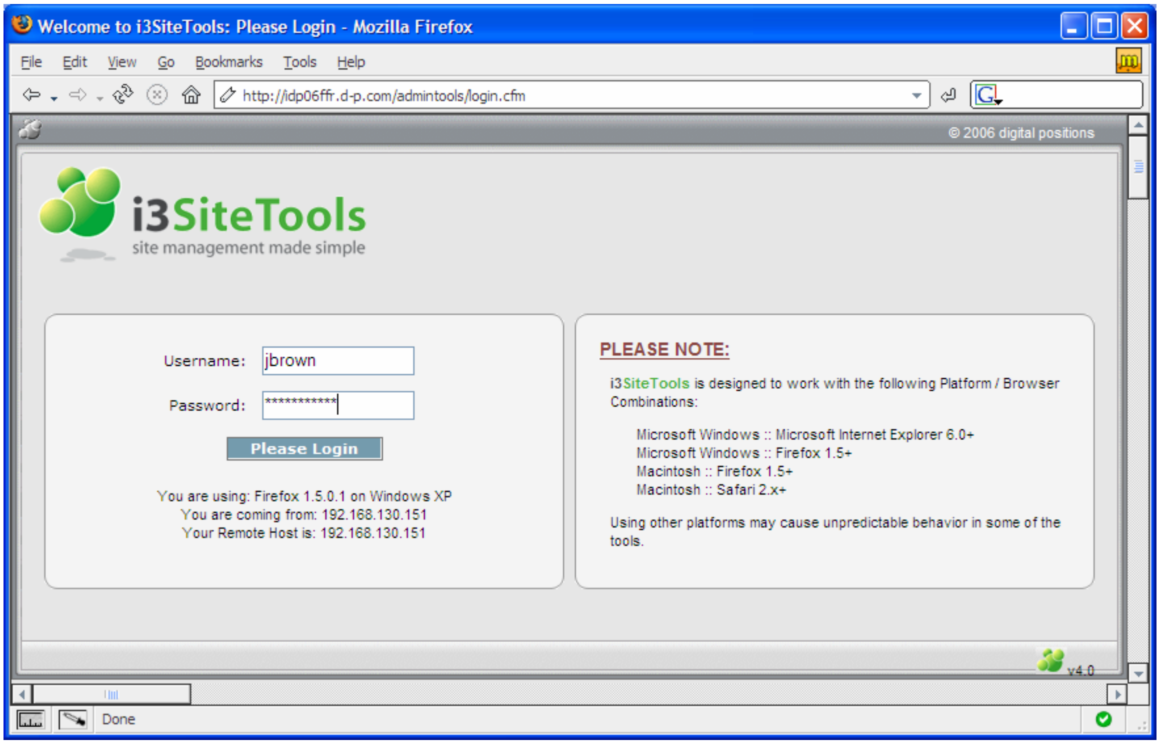

Type in your username and password exactly as they were provided in the email you received, making sure that you use the proper case.

Click the login button

If your login is successful, the current browser window should close and be replaced by another browser window with no toolbars containing your **i3SiteTools** dashboard.

You are now successfully logged in.

If your login fails for some reason, please be sure that your caps lock key is not on and that you typed your credentials in correctly. If you are still unable to login, please contact your project manager.

The **i3SiteTools** Layout

The **i3SiteTools** window is comprised of three frames:

The Header at the top of the screen contains your logo and some important global navigation that you will need throughout your session.

The Left Navigation contains a Flash-based navigation system with an accordion style menu that allows you to browse to the tools you need at any time.

The Content Screen is where all of your work will be done. When you first login, this area will contain the Dashboard.

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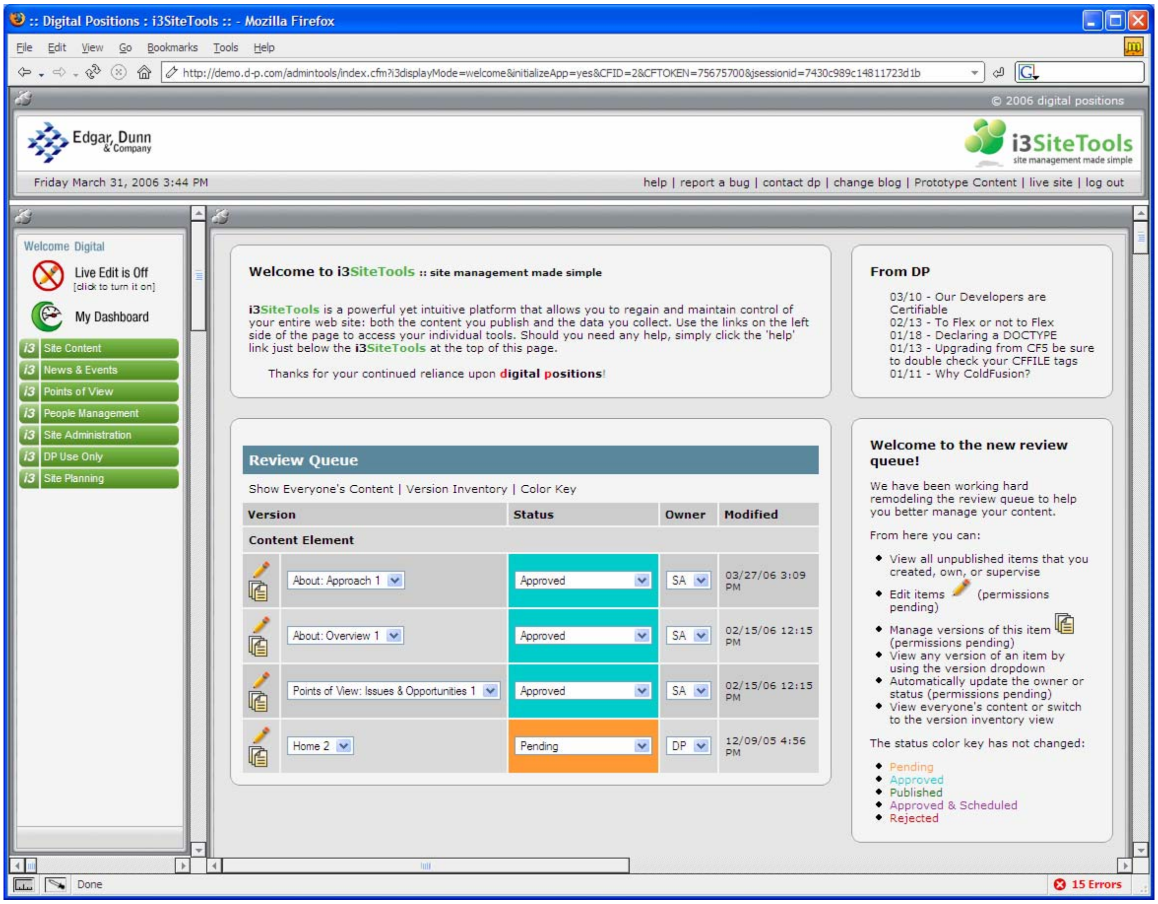
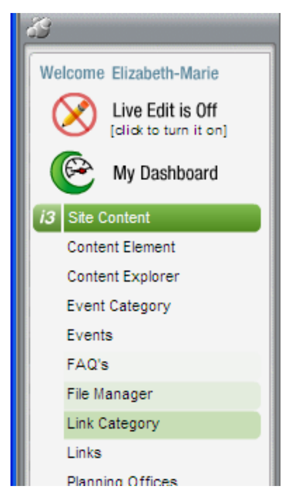


The Dashboard serves as your starting point for all **i3SiteTools** sessions. The dashboard screen, pictured above, will vary slightly based upon your unique installation. Part of the power of our system is that more than half of the tools you will be using have been built custom to fit your business needs. Here you will find news and information from Digital Positions, and your view into the Review Queue.

Look for future enhancements to the dashboard including task lists and messaging and site traffic statistics.

Navigating the Toolset



You can navigate to all of the tools you will be using to manage the content on your site from the Left Navigation frame. Below your welcome message the first button you see is the Live Edit toggle button. Clicking this button starts or ends a Live Edit session depending upon which mode you are currently in. When clicking to turn Live Edit on, a new browser window will open taking you to the home page of your web site.

Directly below the Live Edit toggle is the "My Dashboard" button which you can click to take you back to your dashboard, or "home" screen.

The green accordion-style menu system is what you will use to navigate to all of the custom tools on your site as well as many of the core level site management functions such as the page tool. This menu, like all of **i3SiteTools** is permissions-based so different users with different access levels and tool permissions will see different options.

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The accordion breaks the tools down into logical categories and can be reorganized by our development team to better suit your specific site requirements. Clicking on a dark green category button will reveal the options beneath. Clicking on one of the menu items will launch the targeted tool into the Content Screen to the right.

Note: By design, the back/forward button navigation of your browser is disabled while you are using **i3SiteTools**. We do this to prevent loss of unsaved data as you navigate between tools.

Getting Help

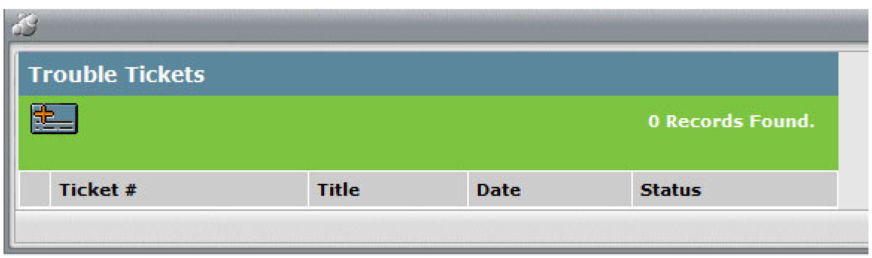
CMC – We need to clean up the formatting of the help a bit and add better navigation. Additionally, we actually need to compile some FAQs – possibly have a tool that allow users to submit questions…

Reporting Bugs

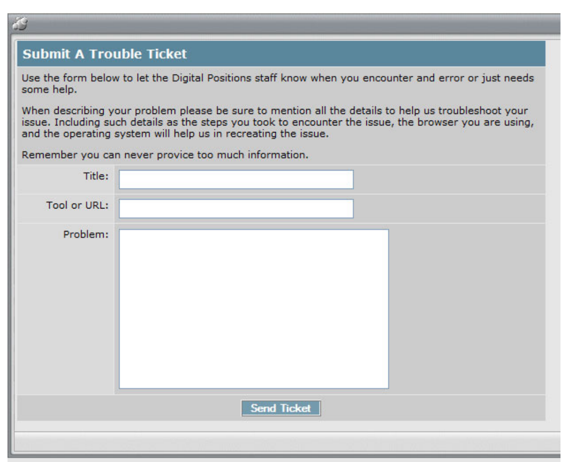
Reporting bugs, issues and requesting assistance is a simple process to accomplish within **i3SiteTools**. You can get to the report a bug screen by either clicking on the "report a bug" link in the top right navigation or by opening the Site Administration menu in the left navigation and clicking on the Trouble Ticket Tool.

Once you click on either of these links you will be taken to the main landing page for the trouble ticket system.

This landing page will list any tickets you've submitted in the past and allow you to view there current status. In future releases we will allow you read messages from the support agent working your issue as well as post follow up messages as the issue is being worked.



Clicking on the blue box icon with the plus symbol in the upper left corner of this page will bring up the form to submit a new trouble ticket. This form consists of a Title field for you to title your ticket (much like providing a subject for an email). The Tool / URL field where you can tell the Digital Positions Support staff the **i3SiteTools** tool or webpage URL which is currently experiencing an issue and finally a problem field. The Problem field is your chance to explain the issue you are having and provide details to the Digital Positions Support Staff which will assist them in resolving your issue. It's important that you are as detailed as possible when providing the problem or request details. Providing information such as the steps you took to encounter the issue, the web browser you are currently using and the operating system you are using will help the agent assigned your ticket in



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troubleshooting and recreating your issue.

An example of a poorly written ticket would look something like so:

Title: HELP ME!
Tool or URL: Articles
Problem: Every time I press the submit button I get an error.

The problem with the above ticket is that it's VERY vague. If a ticket like this is received by the Digital Positions Support Staff it will require us to send a follow-up email or phone call to get more details. This will of course take some time if you are not available when we try to get details. By providing details in your problem report the support agent can begin work immediately.

An example of a well written ticket would look something like so:

Title: The Article Tool is giving me an error when I edit.
Tool or URL: Site Content Menu then select Article
Problem: I've gone into the article tool and I'm currently trying to edit the article titled "Customers who provide detailed reports get better support". I'm able to see and edit the article and I can submit the article and see the confirmation screen but when I commit the article after the confirmation screen I get an error that "form.articleCategoryiD" cannot be found.

The steps I took to get this error was to click on the article from the listing of articles, then I edited the article by changing the body text and removing the category selected and pressed the submit button. The confirmation screen came up next and I clicked the submit button there to save the changes. This is when I encountered the error. I'm using FireFox 1.5 on a windows xp computer at my office.

As you can see the second ticket has a lot more details which will allow the support agent assigned this ticket to get to work right away and have a resolution a lot faster.

Trouble Tickets are the preferred method for reporting problems for a few reasons. The first reason is since you have a logged issue you can track the issue and you also know the current status, so you don't have to waste time calling our office to see if we've fixed the problem yet.

The second reason trouble tickets are preferred is because every time you submit a trouble ticket the information is logged into a central database and a notification is sent to the entire Digital Positions Support Staff. Once this notification is received work typically begins immediately on resolving the issue. When you email your account manager or a Digital Positions employee they will typically have to create the ticket for you, or assign the issue to a support agent. The problem with this arises when the Digital Positions employee you've contacted isn't immediately available, thereby delaying any work which could be done with your issue.

Using "Live Edit" to work with Content

Live Edit is probably the easiest way to work with the content on your site because you can browse from the public side of your site as you normally would and edit the content you have permission to in context.

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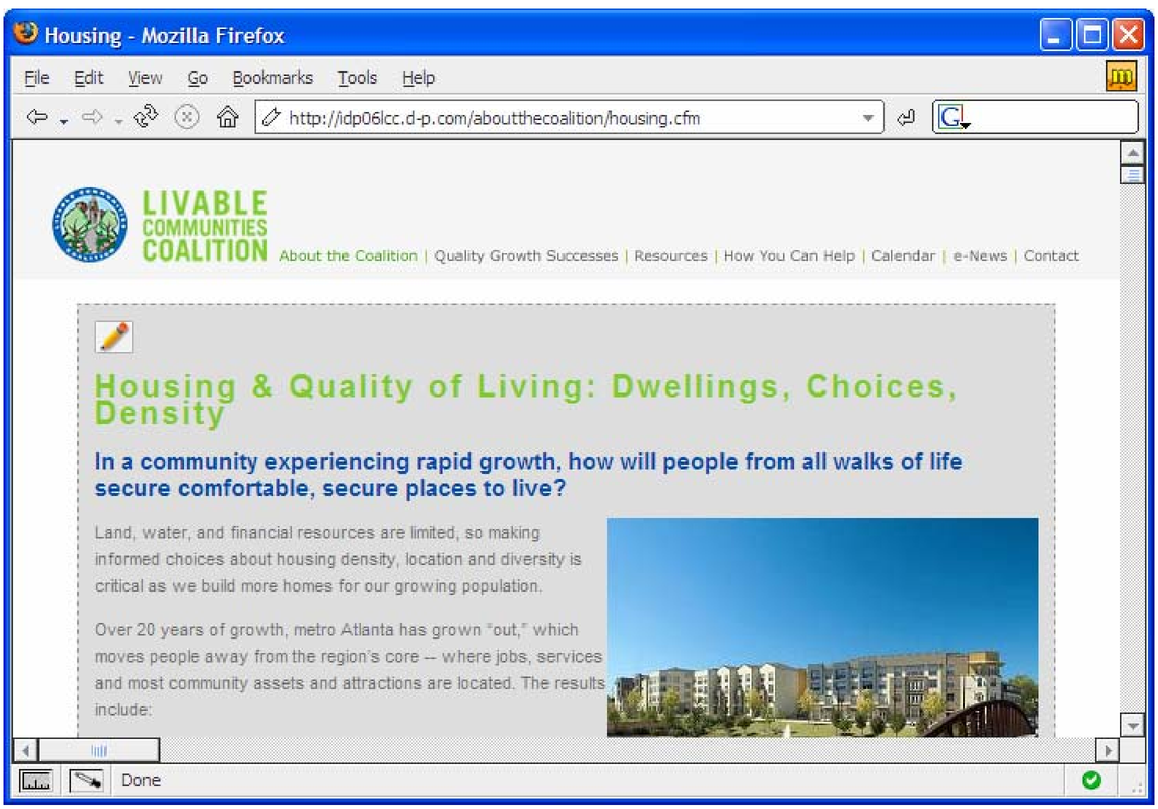
Turning Live Edit On

Starting a Live Edit session is easy. Simply login to your **i3SiteTools** installation and click on the Live Edit toggle button in the upper left corner of your screen. By default, Live Edit mode is turned off when you first login. At any time during your session you can switch Live Edit mode off by returning to your dashboard and clicking the Live Edit toggle button again.

When you turn Live Edit mode on a new browser window will open to the homepage of your web site. You will want to keep the **i3SiteTools** browser window open so you can return to the dashboard if you should need to at any time during your session.

Identifying "Editable" Content

All the content on your web site should display as it normally would until you roll your mouse over elements that are available to edit. Editable content areas will change to a gray background with a dashed outline and a pencil icon in the upper left corner which you click to begin editing.



Once you click the pencil icon, a pop-up window will appear containing the content you selected in a rich text editor. From this window you have complete control to modify the content and it's formatting as well as to preview your changes in context and publish them. The toolbar should be familiar to users who have worked in Microsoft Word, or other word processing programs, however, there are some very

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important differences you will learn about in the next section of this document devoted to Using the Rich Text Editor.

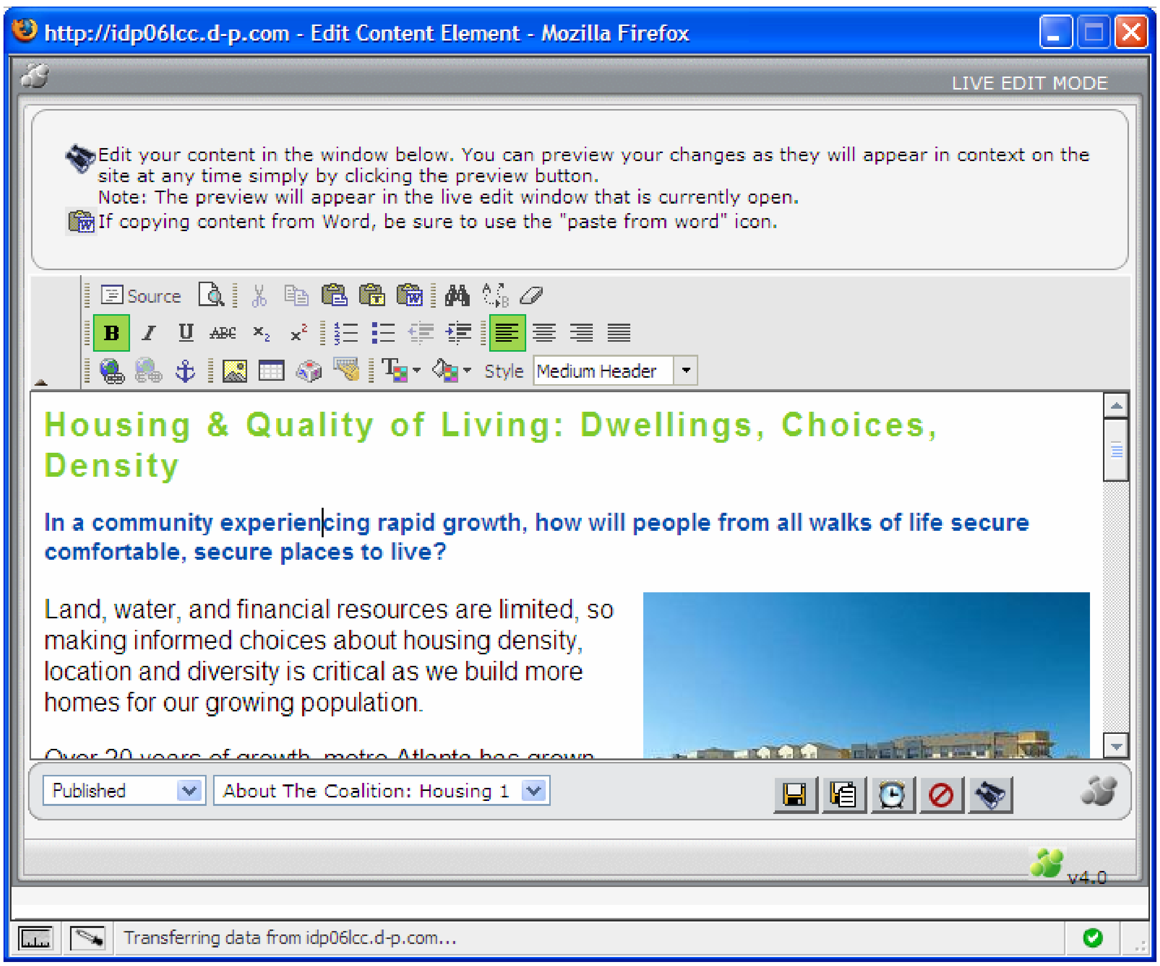
Troubleshooting Common Problems

Problem: Nothing happens when I click the edit icon.

Solution: Your browser is likely using a pop-up blocker utility. Either disable the utility, or modify the preferences to permit pop-ups for the current site.

Problem: I'm mousing-over content but no edit icon appears, nor does the background color change to gray.

Solution: It is likely that either you have not turned Live Edit on properly, or you are using a new browser window that is not aware of your session. Return to your dashboard screen and click the Live Edit toggle button. It is also possible that you are not using a supported browser. For various reasons, not every piece of content on your site is going to be editable via Live Edit. Check with your Digital Positions project manager to insure that the content you are trying to edit is available in this mode.



Using the Rich Text Editor (WYSIWYG)

For the uninitiated, a Rich Text Editor is nothing fancier than the text formatting toolbar you commonly use in Microsoft Word or another word processing application. Using controls you are already familiar with such as a **bold**, or *italic* button allow you to create HTML mark-up without actually learning HTML --- the

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theory being: “what you see is what you get.” We have searched the planet for a browser-based rich text editor that is fool-proof and we have yet to find one that can consistently navigate the snarls of translating user-formatted text into HTML. Currently our editor of choice is a widely used, open source candidate called **FCK Editor**.

WARNING: It is not advisable to “write” lengthy amounts of content in the rich text editor for two important reasons: **1**.) Your **i3SiteTools** session could end before you finish and all of your copy will be lost when you try to submit. **2**.) You do not have the ability to check your content for spelling and grammatical errors. Write your copy in your favorite word processing program, and edit your copy in the rich text editor.

What you see is NOT always what you get

Unlike working with rich text as you know it, web-based Rich Text Editors are actually translating your text formatting changes into HTML (Hyper Text Markup Language). HTML is a tag-based notation that controls the flow and display of text, graphics, tabular data and other embedded elements in web browsers. Translating rich text into HTML is not an exact science, but an approximation because HTML is more rigid in what it allows you to format and to what extent you can “pixel-push.” For the most part you will have no problem doing basic text formatting and adding images, but at some point you will actually have to look at some “raw” HTML code and fix a minor thing here or there. Knowing the basics of HTML is an invaluable skill for anyone using the Internet today, particularly people who are tasked with managing web-based content.

Understanding the Basics of HTML

HTML is actually very simple to read and understand once you have some fundamental knowledge of how it works. In order to “mark-up” text, the browser has to have some way to know where in the string of text the new formatting begins, what the desired formatting is and where it will stop. For example, if we want to make the word **i3SiteTools** bold we would type:

```
<strong>i3SiteTools</strong>
```

HTML tags are always contained inside angle brackets. For every opening tag, there must be a corresponding closing tag, or the tag must be self-closing as in the instance of the tag to indicate a line break: `<br />`. Doing this insures that your HTML will be compatible as HTML transitions into XHTML (Extensible Hyper Text Markup Language) to better integrate with XML. Note that single tags with no self-closing slash (
) will still work, but will one day be deprecated.

Let’s take a look at some sample HTML and go through it line by line to understand what is happening.

Here’s the HTML code:

```
<h1>Welcome to i3SiteTools</h1>

<p>We hope you find this little HTML primer useful.
   <img src=”http://www.somesite.com/logo.jpg” height=”50” width=”200”
border=0 align=”left” /></p>
<h3>Here’s what you need to know:</h3>
<ul>
```


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```
   <li>HTML is your friend</li>
   <li>HTML is more afraid of you than you are of it</li>
   <li>Knowing a bit of HTML will make your job easier</li>
</ul>
```

Here's how the browser will render it:

Welcome to **i3SiteTools**

We hope you find this little HTML primer useful.

Here's what you need to know:

- HTML is your friend
- HTML is more afraid of you than you are of it
- Knowing a bit of HTML will make your job easier

Here's how it works:

The first thing we see is the <h1> tag set. By seeing the rendered version you can probably deduce that this means "Heading 1" and you would be correct. Any text wrapped in <h1> tags will be rendered as the largest heading size. <h2>, <h3> and so on will give you increasingly smaller headings. Next we see an opening <p> tag which indicates a paragraph block. Nested inside the paragraph block we have some text and an image tag: <img>.

Unlike the tags we have looked at so far, the image tag is using "attributes" which you can basically understand as specific instructions for the image. Most of these attributes are easy to figure out simply by their names. "src" is the location of the image file and can either be local to the server, or a full HTTP address as in this example. The "align" attribute tells the image to anchor to the left and force any text to wrap around it to the right.

Finally we see the bulleted list indicated by the <ul> tags which stands for unordered list. Each list item or <li> must be nested inside of either a <ul> or an <ol> which is an ordered list (1,2,3 – A,B,C etc.).

To learn even more about HTML and what is possible, there are an infinite number of tutorials out on the web. We recommend one at the W3C (World Wide Web Consortium) web site to get started.

Getting from Word to HTML

Now that you understand how HTML tags markup your text, you can begin to understand what is happening behind the scenes in Microsoft Word. Word has its own internal system for tracking the formatting you do to text and like viewing HTML in the browser, it is hidden. A logical thing to want to do when adding content to your web site is to copy the text from Word and paste it into the rich text editor. If you do this, a large amount of hidden characters and other trash will be pasted as well that can hinder your content from rendering properly. There are

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two simple rules that if followed will insure that all of your content makes it to the web site exactly as it should:

Format your text in Word using the standard styles available in the drop down, rather than manually customizing your own. For instance at the top of a section, use the Heading 1 style for the title, not a custom style of your own such as Bold 16pts.

When pasting from Word into the rich text editor, use the "Paste from Word" button in the toolbar to filter it first.

Below is a list of the supported formatting in Word that translates well into HTML:

Heading 1

Heading 2

Heading 3

Normal

Bold

Italic

Bulleted List

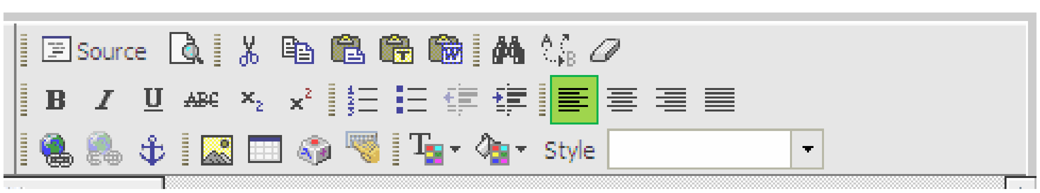
Ordered List

Text Align (center)

By limiting yourself to these initially, you will insure that your text displays beautifully and consistently with the overall styles designed for your site. If you encounter specific needs beyond this basic formatting, you can let your Digital Positions project manager know and our team can modify the master style sheet and drop down menu to accommodate your request. Additionally, as you get more comfortable with HTML, you can use the "Source" button in the rich text editor to add your own custom markup tweaks directly to the HTML source code.

Tour of the Tool Bar

To get the most out of the rich text editor, you need to understand what all the buttons in the toolbar do. Depending on the requirements of a particular piece of content, you may only see a sub-set of the master toolbar pictured below.



Each button is described in order of appearance from top left to bottom right below.

Source

This button pops open a window that reveals the underlying HTML source code for the content in the rich text editor. You can clean up poorly formatted HTML here, or add more advance HTML formatting that is difficult or impossible using the WYSIWYG tools. Note: changes you make will only take affect if you click the "Ok" button in the bottom right corner of the window.

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Preview

This button pops open a window that allows you to preview how your content will actually display in the browser. There should be no difference from what you are seeing in the rich text editor window itself, but this preview may be useful when you are working with a large amount of content that is difficult to see within the confines of the text editor.

Cut/Copy/Paste

These buttons perform exactly the same as any other software application. *Cut* removes the selected content and stores it in clipboard memory. *Copy* stores the selected content in memory. *Paste* places whatever the last item stored in clipboard memory was where your cursor is positioned in the text editor. Note: the common keyboard shortcuts for these functions work as well. Ctrl + C = copy, Ctrl + V = paste, Ctrl + X = cut

Paste as Text

This button opens a window with a text field that allows you to paste in content that you want to strip any formatting from. Use this option when you are unsure of what hidden markup could be applied to the text and you want to manually format the text from scratch.

Paste from Word

If you work in Microsoft Word, you will use this button whenever you paste content from one of your documents. When clicked, this button opens a small window with a text field where you will paste your content. It is critical that you use this utility to avoid pasting in hidden markup that may cause undesirable results in the display of your content.

Find/Replace

Clicking the find button will allow you to search through the content within the text editor for a specific word or phrase. The replace button will search for a specific word or phrase and replace it with another word or phrase that you specify.

Remove Format

This button will remove any formatting previously applied to the selected text in the editor. Note: this will only remove formatting that you applied using the rich text editor.

Bold/Italic/Underline/Strikethrough

These buttons when clicked apply their indicated style to whatever text you have selected in the editor. Clicking the button will remove its specified style from any text you currently have selected. Note: the commonly used keyboard shortcuts work: Ctrl+ B = Bold, Ctrl + I = Italic, Ctrl + U = Underline.

Super-Script/Sub-Script

Use these buttons whenever you want the selected text to appear above or below the standard text line respectively. Commonly, footnotes are indicated using superscript. Scientific notation will often require sub-scripting.

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Numbered List/Bulleted List

These buttons allow you to create lists in the editor window. You can apply bulleted or numbered list formatting to selected text, convert from one to the other, or remove the list formatting altogether. Note: typically your site has global style definitions established for lists at design time. If you would like to see something different, please contact your Digital Positions project manager.

Increase Indent/Decrease Indent

Clicking the *increase indent* button will push the selected text to the right in increments of 40 pixels per successive click. The *Decrease indent* button will remove the 40 pixel indent. Note: the following HTML is applied to the selected text:

```
<div style="margin-left: 40px;">This is my indented text</div>
```

If you would like to customize this amount, you can modify the margin-left attribute of the style by clicking the source button and editing the HTML directly.

Text Alignment

The toolbar provides you with four different text alignment options: left justified, center justified, right justified and block justified.

Insert/Edit Link

This button will open a dialog window with numerous options for creating links from the text you currently have selected in the editor window. See Adding Hyper Links below.

Remove Link

This button simply removes an associated hyperlink from the selected text when pressed.

Insert/Edit Anchor

This button prompts a dialog window that allows you to assign a name for the anchor you will be assigning to the selected text in the editor window.

Insert/Edit Image

Clicking the image button opens a dialog window that allows you to browse for an image file to insert into the content at your current cursor position in the text editor. See Adding Images below.

Insert/Edit Table

This button opens a dialog window where you can specify the dimensions and other attributes of an HTML table to be inserted at your current cursor position in the text editor. See Working With Tables below.

Insert Special Character

This button opens a window with a grid of ASCII characters that are commonly used. Here you will find symbols like ®, © and ™. When you click on a character from the grid, it is inserted at your current cursor position in the text editor.

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Universal Keyboard

This button opens a window with the Universal Keyboard. This utility is what you need for entering foreign language content. The virtual keyboard can switch between various languages. When you have the language you want selected, use the keyboard to type the content, then click the "OK" button to insert it into your current cursor position in the text editor.

Text Color

Clicking on this button reveals a color palette window where you can specify an RGB color to be used on the selected text in the editor window.

Background Color

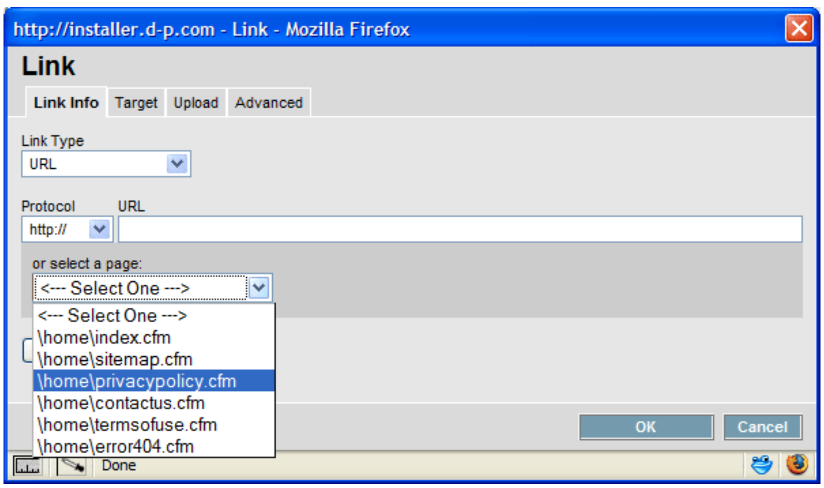
Clicking on this reveals a color palette window where you can specify an RGB color to be used for the background of the text selected in the editor window.

Style

The style dropdown menu consists of standard formatting styles and any custom formats that you may need to markup the content on your site. Typically you will be using the various Heading formats from this menu.

Working with Hyper Links

To add a hyperlink to selected text in the editor, click link button in the toolbar and the dialog window (pictured to the below) will pop-up. When



linking to files or pages that reside on your site, you can use the "*or select a page*" drop down located below the **Protocol** & **URL** form fields. Selecting a page from this drown menu will automatically populate the **URL** form field with a path relative link to the chosen page. For example, to link to the Privacy Policy page in the about us section you would select the following: /home/privacypolicy.cfm. If you are linking to a location somewhere other than your local site, you must provide an absolute URL.

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Absolute versus Relative paths

Whenever we refer to paths or URLs in Internet terms, we are referring to a specific address or location where a file resides. Every time you click on a link in a web browser you are following either a relative or an absolute path to that file. It is recommended when creating links to files that you know reside within your site that you use relative paths for two reasons:

When we are doing the initial build out of your web site, and you are adding your launch content, the site will be hosted on our development server, so the absolute path is not the same as it will be when we launch the site.

Relative paths do not have to go out across the Internet to lookup the location of the file you are linking to. They simple look within your site for the file.

Window Targeting

When you want a link to open into a specific or "target" browser window, you must specify the name of the window. All browsers recognize the following reserved target names:

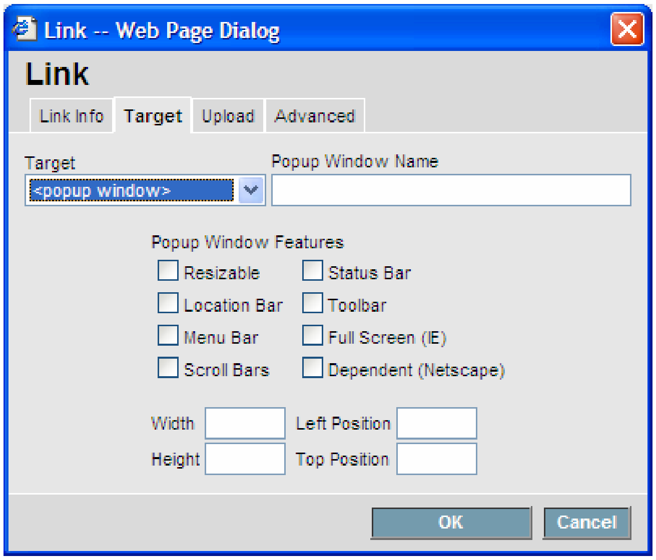
_blank : Opens a new browser window with the same settings as the current active window.

_top : Opens a link in the top, or outer-most window when framesets are being used.

_self : Opens a link in the current window. This is the default behavior of all links with no target attribute specified.

_parent : Opens link in the parent window that spawned the current window where the link resides. Generally this is used with when you want to navigate pages in one browser from a pop-up window.

Creating Pop-up Windows



Under the "Target" tab of the link pop-up from the toolbar, you have the option to create pop-up windows easily. To do this, simply select <popup window> from the Target dropdown menu and specify a unique name for your window being careful not to uses any spaces or special characters other than underscores. You have the ability to customize the appearance and functionality of the window via the series of checkboxes below. You can also specify a width, height and screen position. Note: If you are unsure as to the length of the content that will be in your popup, or you expect it to be long, you should be sure to check the "Scroll Bars" option to insure that your users will be able to scroll down to read all of the content.

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Working with Images

Directly from the rich text editor tool bar you have the ability to place an image anywhere you like within the content you are actively editing. In this section we will cover everything you need to know to add images to your content.

Guidelines for Imagery on the Web

In general, the most damage you can do to your web site from a visual standpoint is to add images without following a few basic guidelines and understanding some important concepts regarding imagery and the web.

The biggest mistake most people make is using images that are simply too large. When inserting imagery into body content elements, you should never use an image that is more than half the width of the column of text you are working in. For example, if you are working with a column of text on your about page that is 450 pixels wide, you should not use an image larger than 200-225 pixels wide. Ideally you should go smaller so you can allow enough of a margin to keep it from feeling too cramped.

Another common problem is not saving files in the appropriate format. In general, you will use one of two formats to publish images to your web site:

GIF – (Graphic Interchange Format) this simple 256 color based file format is best used for non-photographic imagery such as line-art, cartoons, text banners and buttons. You should never save a photograph as a GIF because it will not look smooth and clean and it will likely produce a very large file size.

JPEG – (Joint Photographic Expert Group) is by far the most used image format today because of its superior quality relative to its small file size. JPEGs are the best option for photographic imagery. In your favorite graphics program you can usually save a JPEG out with a quality percentage setting between 50 and 60% and strike the right balance between quality and file size.

When saving files, you should make an effort to get the file size as small as possible to insure that it downloads quickly for your visitors. Generally, with a few exceptions a single image file should not exceed 30 – 50Kb at the absolute maximum. Ideally you should aim for the 15 – 25Kb range.

Naming conventions are a good habit to get into especially when you are dealing with a lot of files such as company employee head shots. Naming conventions for any file that will live on your web site, image or otherwise, should adhere to some simple rules:

1. **Never** use spaces
2. Avoid all special characters such as /,&,$, etc. except underscores (_).
3. Always use the appropriate 3 letter file extension: mybanner.jpg NOT mybanner.jpeg

Finally, you should be very judicious about the images you choose to put on your web site. The use of clipart and animated GIF elements will seriously cheapen the appearance of your overall site design. The photographs you select should not only work well within the look and feel of your site from a color perspective, but also from a contextual one. If your site uses stylized stock photography that uses a lot of warm tones and soft focus filters, you don’t want to use a sharp focused

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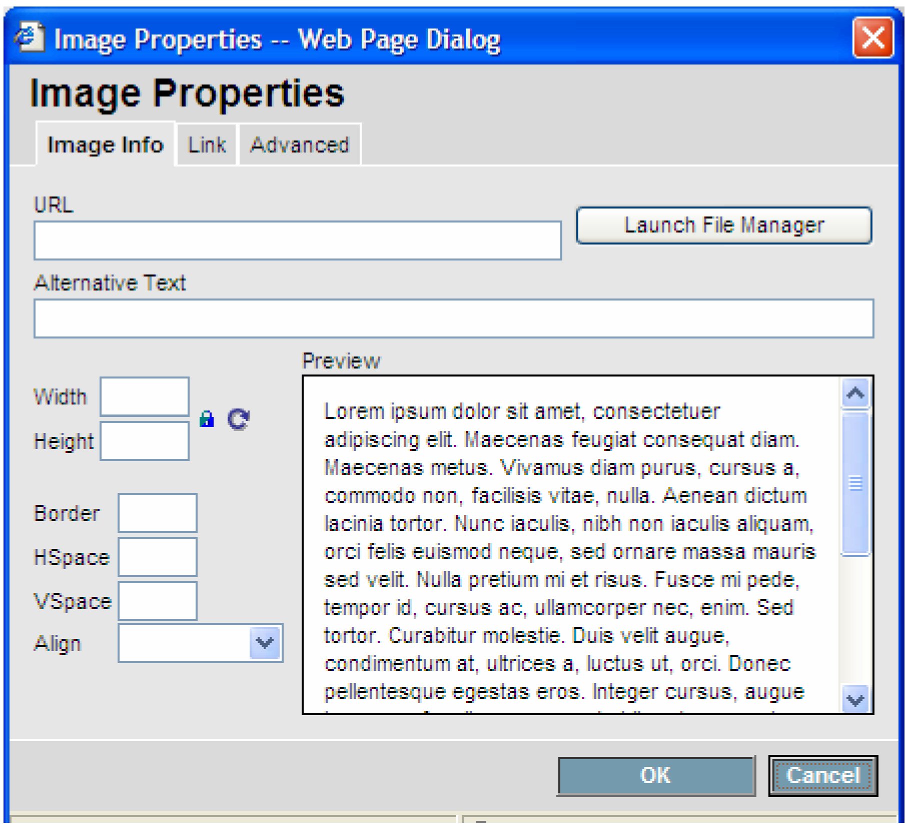
photograph with high contrast and mostly cool colors. In general, good imagery for your site should follow these basic guidelines pertaining to design:

1. Be relevant to the content on the page where it is being used
2. Be cropped appropriately so that the focal point of the image is not diminished
3. Match the rest of the imagery on the site in color palette, focus, border treatment and content

Adding an Image to Content

Clicking on the image button from the rich text editor tool bar will open a window like the one pictured below:



If you happen to know the exact URL (location of the image file) you can type it in the URL field. If the image resides within your web site, you should use a relative path for the URL. If the image you wish to use resides in some other place on the web, you will have to use an absolute path for the URL. Images are not embedded in HTML, but rather linked to from another location. To upload a new image from your local computer, or to locate a file you uploaded previously, click on the "Launch File Manager" button which will open up a window with the File Manager (see "Working with files in File Manager") interface.

After you have specified the image URL, you should supply some alternative or "alt" text for the image. This is always a good practice for two reasons: one, you are allowing visually impaired visitors and people who may be viewing your site without image rendering capabilities to know what the image represents and two, you are making your site more content-rich for search engines.

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Changing Image Display Properties

Once you have selected an image from File Manager, or typed in a valid URL you can preview how that image will display by clicking the “reset size” icon which is located directly to the right of the width and height fields. You may have to click the button twice for the correct dimensions to be calculated. The image you selected will display in the Preview window. You should always provide correct height and width dimensions for your images. Specifying incorrect dimensions will cause the image to distort and failing to use the dimensions will take the browser longer to download and correctly place the image. If necessary, you can proportionately scale the image down by changing either the height or the width value provided the “Lock Sizes” icon is in the locked position.

You may specify a border size (1,2,3, etc.) but if you want more control over the exact size, style and color of the border, you should click on the advanced tab and enter a CSS inline style declaration like this:

```
border: 1px solid #000000;
```

in the *style* field at the bottom of the window. This sample code will create a thin solid black border around your image. You can provide a different hexadecimal code to make the border any color you choose.

HSpace and VSpace stand for Horizontal and Vertical space respectively and these values basically determine the margin of white space around your image. Because these values render differently in different values, if you want more control you should click on the advanced tab and enter another CSS inline style declaration like: `margin: 10px;` which will create a 10 pixel margin on all sides of the image.

Finally, the alignment drop-down menu provides you with a number of choices as to how the text will wrap around your image. If you do not specify any alignment, your image will display inline with the text by default. Generally, you will want to use the “Left” or “Right” options when including a graphic in the body of some textual content. You can try out different options and preview them before making your final selection.

Editing an Image

Once you have placed an image in the body of your text, you can easily move it simply by clicking on the image and dragging it to a new location. It will retain the properties you assigned it. To bring up the properties panel for an image where you can make changes to the URL, alignment, etc. right click on the image and select the “Image Properties” option. From this window you will be able to replace the image, and/or edit its display properties.

Removing an Image

Removing an image from any content element is simple. First you must browse to the body content element either in Live Edit mode or through the Content Element tool. If the image is contained within a field of a custom tool, browse to that tool via the left navigation. Inside the rich text editor that contains the image, simply select that image and press the delete key on your keyboard. Once you have saved the changes, the image will no longer display in that location, but will remain in the File Manager library for use later. Note, the image will also remain in other content elements that reference it until you explicitly remove the image from them as well.

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Working with Tables

When to use

Tables should be used whenever you want to display tabular data. If you are unsure if your data would work in a table then imagine it being in an Excel document. If your content will look good and be functionally representative inside an excel document then it's probably a good candidate for a table.

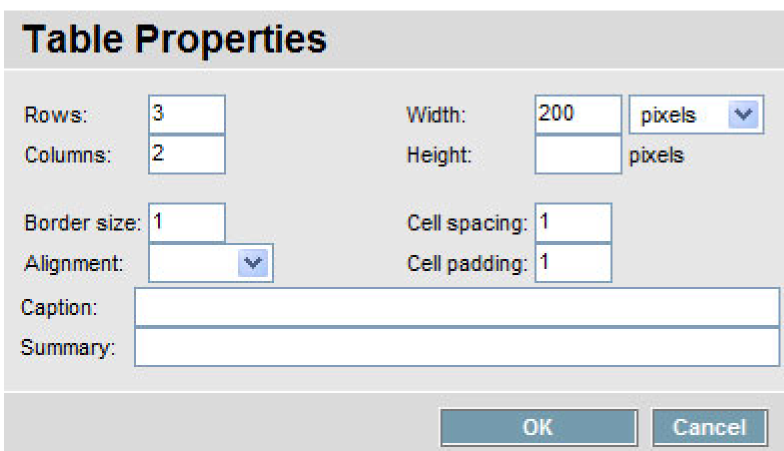
Examples of content which are typically in tables include employee listings where you want to show the employee name and other bits of data in separate columns. Any content which can be best represented by multiple columns and rows for display.

You should not use tables to layout articles, or large pieces of content unless you've been directed to do so by the Digital Positions developers or support staff.

Tables typically consist of multiple rows and or columns. If you find you are building a table which only has one column you should try and format that data using a bulleted list, a numbered list, or ask Digital Positions for alternatives.

Creating and manipulating tables

To create a table in **i3SiteTools** you first need to make sure you are using the built in editor. You'll know you are using the editor because above the area where you type in your content will be one or more menu bars. In this menu bar will be an icon which looks like an excel spreadsheet or a table (depending on your interpretation of the image). Clicking on this icon will launch the table properties menu seen below.



This is a very simple property panel to work with.

The **Rows** and **Columns** field will let you determine how many rows and columns this table is made up of (Remember rows go from top to bottom and columns go from left to right.

The **Width** and **Height** fields will allow you to set a fixed width and height for your table. You can choose to have the dimensions in either pixels or percentages. It is recommended you use percentages unless you know the exact dimensions of the area where the table will fit. By using pixels it is possible to create a table which is

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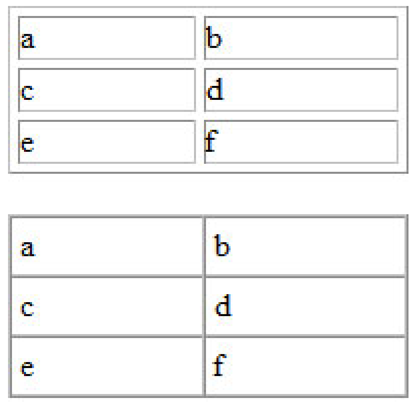
larger than the content area. Doing this will break the overall layout of your site and will probably produce undesirable results.

The **Border size** field will allow you to place a border around your table. Setting this value to 0 will produce a hidden table. Whereby the data will still be displayed in a tabular format but the visitor to your site will not be able to see the individual cells and their associated borders. It is a common practice to build tables with a border of 0.

The **Alignment** field will allow you to determine where your table will align on your page. You can align a table to the left, right, or center

The **Cell Spacing** and **Cell Padding** fields will add cushion to your table. The Cell spacing field will add space between the individual cells and also affect the size of your borders while the cell padding will add space inside of each cell and not affect the overall size of the cell and table borders.



a	b
c	d
e	f

a	b
c	d
e	f

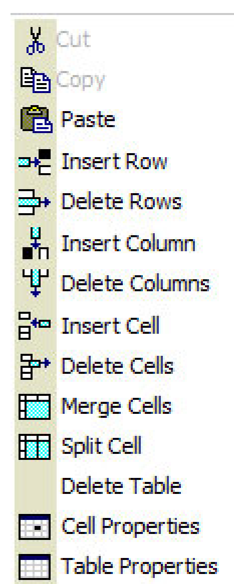
In the image to the right we see two tables. The top table has the cell spacing set to 4 while the table on the bottom has the cell padding set to 4.

As you can see the letters in top table press right up against the table borders while the letters in the bottom table appear to have some cushion around them which pushes them away from the table borders.

Finding a good combination of table spacing and padding can dramatically change the look and feel of your tables. So spend some time playing with these values until you get the desired effects.

The **Caption** field and **Summary** field do not produce anything which your average users will be able to "see" but are there for certain accessibility issues. If you'd like to learn more about this please contact the Digital Position Support Staff for assistance.

Further Table Manipulation and Working with Table Cells



Once you have your table created it will appear in the editor and you can begin to add content to each of the individual cells. If at any time you need to make changes to your table you can simple right click inside the table and a menu will appear giving you a plethora of options.

With this menu you will be able to insert and delete Rows and Columns in your table. You can also insert and delete individual cells, merge cells together and split cells into multiple rows or columns.

There is also an option to delete the table and by clicking on the table properties link you can return to the table properties screen we talked about above.

Clicking on the cell properties link will bring up a new window which has all the properties and settings you can manipulate for specific cells.

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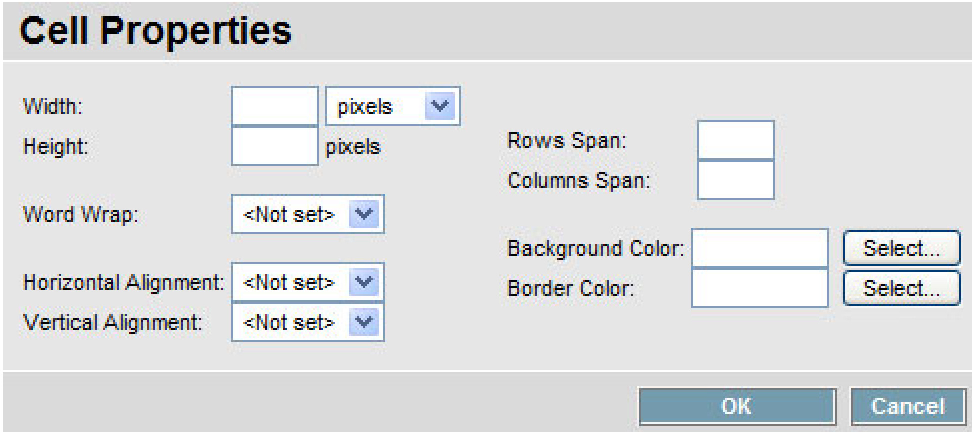
This cell properties window will only affect those cells which you have either right clicked from, or selected by holding down your mouse button and dragging to highlight those cells. The cell properties window appears as follows.



The **Width** and **Height** fields work much like the table width and height fields except that it only affects the selected cells and cannot be bigger than the overall table width or height.

The **Rows Span** and **Columns Span** fields allow you to tell a cell when it should span multiple rows or columns. These fields work much like the merge and split options in the right click menu.

The **Word Wrap** field tells the HTML if it should wrap long strings of data or just let the data push the table cells wider and taller. Setting this option to yes will force the text to fit within the width of the cell and only grow the cells height.

Horizontal Alignment and **Vertical Alignment** affect the layout of your text within a cell. You can position your text to align in a Left, Right or Center horizontal alignment or a Top, Middle, Bottom, or Baseline vertical alignment.

The **Background Color** and **Border Color** fields will allow you to choose specific background and border colors for your selected cells.

Fixing it in the HTML Source

While using the built in editor for **i3SiteTools** there might come a time when you can't seem to fix or do something effectively. Typically fixing or doing this "stuff' requires you to get the HTML source code for the content you are entering. If you look at the menu bar for the editor you'll notice there is a button which says source (note: this button isn't always available). Clicking on this button will pop open a new window which is all white (if you haven't typed anything) or it might look like a bunch of HTML or some foreign language depending on your level of experience. If you immediately recognize it as HTML then you probably already know what to do most of the time here. If it looks like some foreign language to you tread lightly but don't worry you (or digital positions) can almost always fix any issues created. Let's take a look at the source screen real quick.

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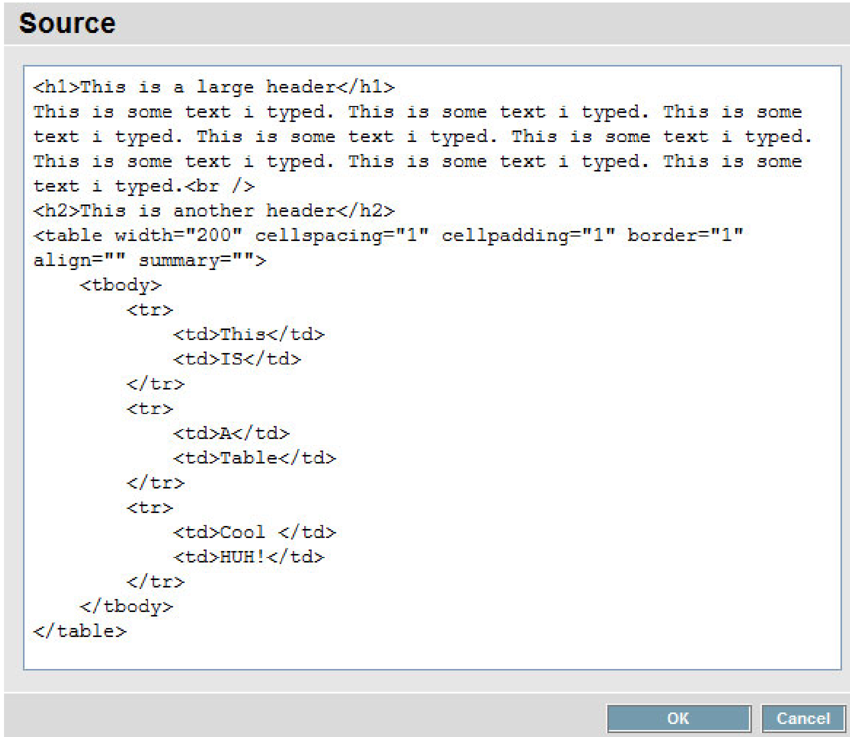

In the above picture what you are looking at is basic html code. HTML is the code which creates web pages at the most basic level. All HTML is made up of Tags. A tag typically starts with an open bracket ‘<’ has some text in it and then ends with closing bracket ‘>’. These tags usually come in pairs with an opening tag and a closing tag. The opening tag might have a lot more stuff inside it and the closing tag will always start with an open bracket followed by a forward slash ‘</’. Some tag examples from above could include the Heading Level 1 Tag which has the opening tag ‘<h1>’ and the closing tag ‘</h1>’. The text between the opening and closing tag “This is a large header” is simple the words the visitor to the website will see. The h1 tag tells the browser to make this text large and put it on it’s own line.

Other tags we see above include the <table> tag which has additional text inside the opening tag. The extra words are attributes and they help further define the tag. We won’t go into detail about these attributes since there a lot of them available. Besides the <table> tag you also have the <tr></tr> which denotes the start of a table row and the <td></td> which denotes the start and end of a column within a table row. <td> tags are always inside of <tr> or <th> tags. (<th> tags are just like <tr> tags but they treat the text differently and should only appear in the first row of a table). The last tag we should be looking at is the
 tag. This tag is a line
 think of it as a carriage return. Placing this tag will force whatever text is after it onto a new line.

Troubleshooting Common Problems

Many times your problems will arise from copying text from one program into the editor. (Like when you copy Microsoft Word text from the Microsoft Word program into the editor). Many programs will copy over a lot of extra junk which isn’t needed because it doesn’t really do anything, or it sets some form of style which is undesired.

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Many times you can fix these problems simple by opening up the source view, finding the text you WANT to keep and then removing out all the tags around the text. Then once this is done you can save it and use the editor to stylize it.

If you need more help with this you can contact Digital Positions to arrange for some additional training.

A Note about CSS (Cascading Style Sheets)

Cascading Style Sheets (CSS) are used to define styles for your site such as fonts, colors, line spacing, margins, etc. They are extremely helpful in creating continuity throughout your website.

In most cases, the look and feel and therefore CSS styles are defined during the initial set up of your website. There are three ways to define the styles that you wish to use in your site.

External Style Sheets – a separate file that defines all your styles

Embedded Styles – styles defined at the top of the html document

Inline Styles – styles defined for one particular element directly inside the html code.

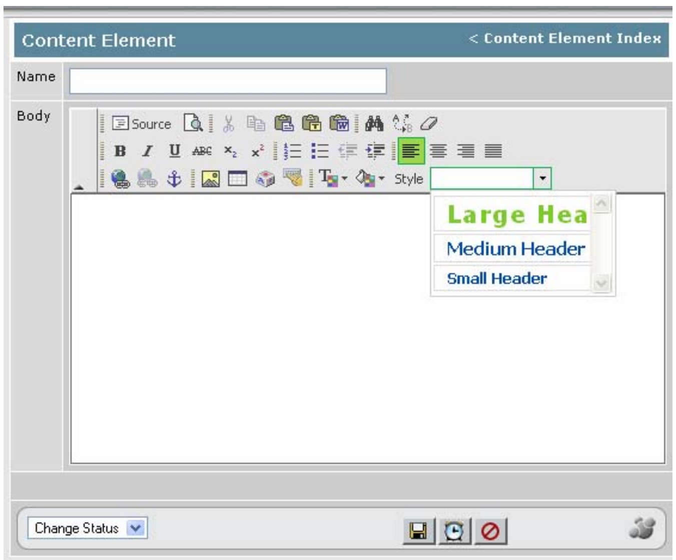
Let us do the work

Here at Digital Positions we utilize external style sheets that can be applied site-wide as opposed to creating styles for only one page or one element.

Since we are taking steps to stylize your content you may ask why CSS is important to you, the end user. This is simple: by allowing you to control your html content you also have control over inline styles in your html. Furthermore, any styles defined inline will automatically override our external style sheet and possibly throw off the look and feel of your website. There are some steps you can take to prevent this from happening.

Insure consistency across site

In most cases, content is copied directly from Microsoft Word which can be dangerous. When copying from Word inline styles are automatically inserted into your html, most of the time without your knowledge. This is one reason why it is so important to use the "Paste from Word" functionality. This will help clean up some of the inline styles Word inserts automatically. However this does not always solve the problem entirely.



In addition to using the "Paste from Word" option, there are other steps you can take to ensure consistency in the style of your content. The easiest step to take is to use the style dropdown provided in the rich text editor.

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In the example provided you can see there are three standard styles (large header, medium header, and small header). This dropdown will vary from site to site but the idea remains the same. The more often you can use standard styles from this dropdown, the less likely it is that inline styles will cause problems.

Troubleshooting Common Problems

If after using the “Paste from Word” functionality and utilizing the standard styles you are still having problems, you may have to dig deeper and look at the actual html source code. First you will want to ensure that your html is well formatted. You will also want to clean up any inline styles or tags that can affect your content’s style. There are a few items that will need to be deleted from your html source. They include:

 and tags

 and tags

Inline styles inside tags. For example, in your html code <p style=”font-family: Arial;”> you would need to delete ‘style=”font-family: Arial;”’ leaving the remaining <p> in your html.

Understanding Versions and Content Publishing

In order to help you better manage content on your site **i3SiteTools** allows you to create versioned content. This means you can create multiple versions of one content piece. For example, you might have one content piece called “About Us”. You may have one version of this content that is ready to publish on the website. You may also have a second version of “About Us” that is a work in progress and will replace the current content at a later time. In this case, you could create two versions of the “About Us” content, one for the currently published content and a second for your work in progress. In this way you are able to easily track the present and future states of the “About Us” content simply by viewing different versions.

Understanding Versioning

To get the most out of content versioning, you must first understand how the system handles versioning.

Version Identification

When dealing with multiple versions of one content piece it is important to uniquely identify each version in order to avoid confusion. **i3SiteTools** accomplishes this by automatically assigning a number to each version. Versions are numbered 1-n, 1 being the first (oldest) version created and n being the last (newest) version created.

In addition to automated numbering, you are also able to specify a label for each version so you have a more familiar way of recognizing each version. Returning back to our “About Us” example, the two versions could be labeled “About Us: live version” and “About Us: in progress”. You have complete control over what to

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name each version but just make sure it is going to be something that is easy for you and all content managers to recognize.

Status Assignment

To identify the version you wish to display on your website and those that will remain behind the scenes you can assign a status to each version. A status color key used throughout **i3SiteTools** to provide you with a visual cue. The options for version status are as follows:

Published: the version that currently appears on your site

Approved: versions that have been approved to be published

Approved & Scheduled: versions that have been approved and a time has been set for them to be automatically published

Rejected: versions that have been rejected

Pending: versions that are currently in progress or are waiting for approval

In the event that a version has been created without specifying a status it will automatically be set to “Pending”. Also note, only one version can be published at a time. If you set a version to “Published”, any existing version that was set to “Published” will be reset to “Approved”.

Managing Versions with the Review Queue

The Review Queue is a tool we have created to help with the review and management of all content. There are four different Queue views which are detailed below. **Note:** The review queue is permission based, meaning you only have the ability to view, access, and modify items if you have permission to do so.

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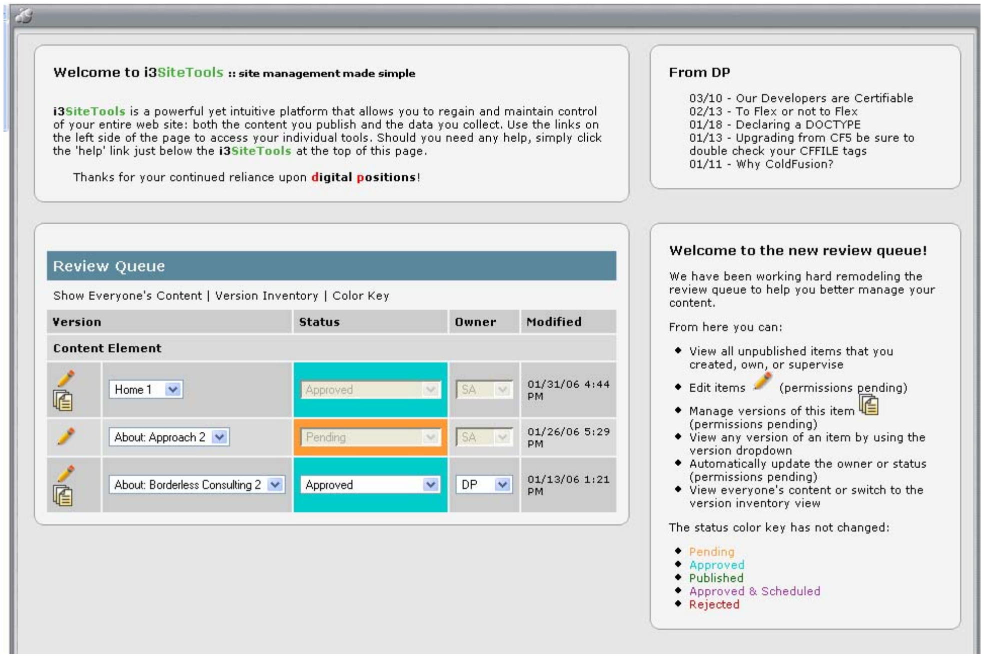
View 1: Dashboard

This is the initial view you will see after logging into i3Site Tools. This view only shows items with *unpublished* versions that you own, supervise, or created.



The Queue is broken up into the following columns:

Edit Buttons: Links to allow you to edit the version selected and only show for users who have permission to access these areas

Edit Icon: link to the form object (ie: content element) section WYSIWYG edit view for that version

Version Management: link to the version management review queue view (see below for functionality)

Version: This is a dropdown showing all unpublished versions of a particular item. The dropdown shows the version name followed by the version number. If the element is not versioned, only 1 item will display in this dropdown. The information in each row reflects the item selected in this dropdown. Changing the dropdown will update the row to reflect the selected version.

Status: This is a dropdown of all status items available. Changing the dropdown will automatically update the version status. If you do not have permission to edit the status of the selected version, this dropdown is disabled.

Owner: This is a dropdown of all possible owners for the selected version. Changing the dropdown will automatically update the version's owner. If you do not have permission to change the owner, this dropdown is disabled.

Modified: The date the selected version was last modified.

View 2: Condensed View

This view can be reached by going to Site Content>Review Queue in the Left Navigation Frame, or from a link from any other Review Queue view. This view is

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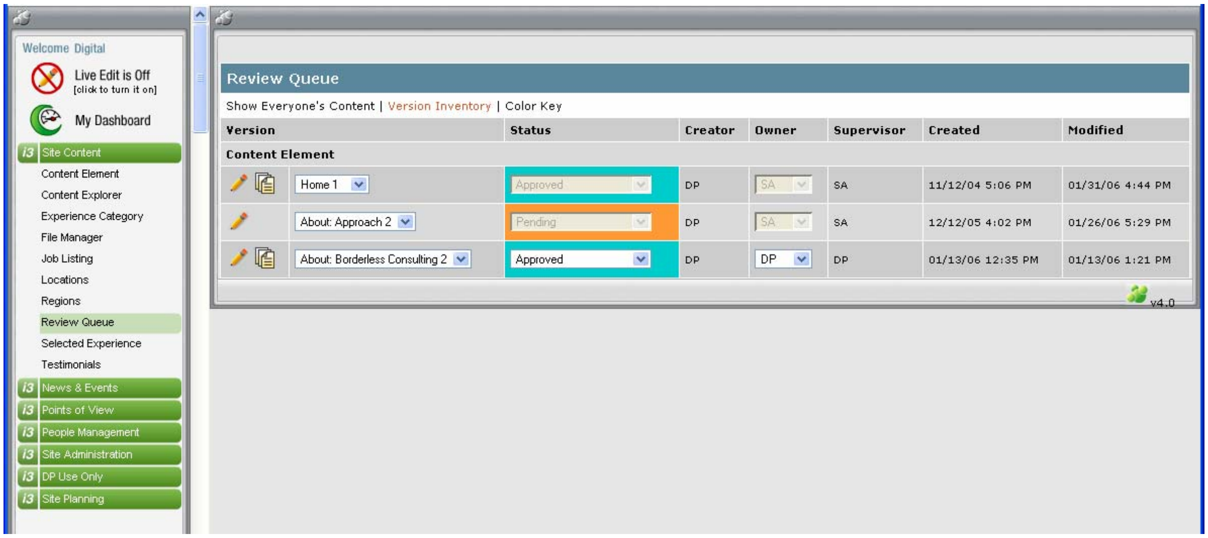
exactly the same as the dashboard view with the exception that it shows additional information. This view shows *unpublished* versions only.



You have the ability to toggle between:

My Content (default view): Only shows items with versions that you own, supervise, or created

Everyone's Content: Shows all items

The Queue is broken up into the following columns:

Edit Buttons: Links to allow you to edit the version selected and only show for users who have permission to access these areas.

 **Edit Icon:** link to the form object (ie: content element) section edit view for that version.

 **Version Management:** link to the version management review queue view (see below for functionality).

Version: This is a dropdown showing all unpublished versions of a particular item. The dropdown shows the version name followed by the version number. If the element is not versioned, only 1 item will display in this dropdown. The information in each row reflects the item selected in this dropdown. Changing the dropdown will update the row to reflect the selected version.

Status: This is a dropdown of all status items available. Changing the dropdown will automatically update the version status. If you do not have permission to edit the status of the selected version, this dropdown is disabled.

Creator: The user who created the selected version.

Owner: This is a dropdown of all possible owners for the selected version. Changing the dropdown will automatically update the version's owner. If you do not have permission to change the owner, this dropdown is disabled.

Supervisor: The supervisor of the selected version.

Created: The date the selected version was created.

Modified: The date the selected version was last modified.

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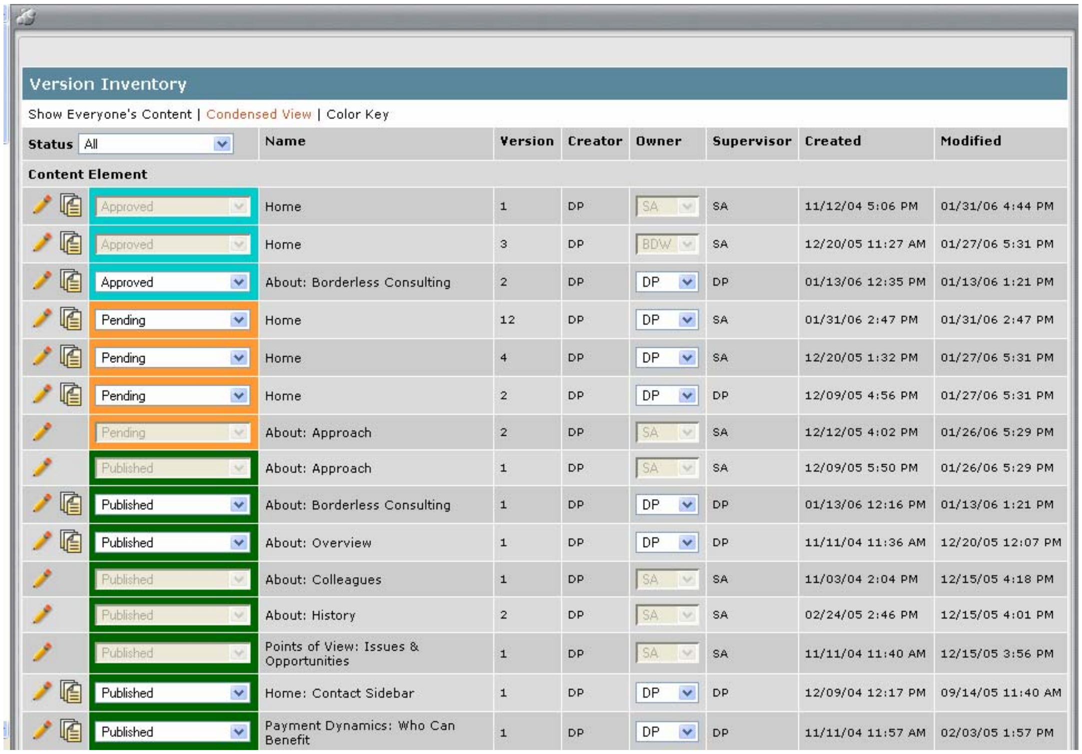
View 3: Version Inventory

This view can only be reached using a link from any other Review Queue view. The purpose of this view is to show every single version instance in a separate row so you can view all versions at once. Unlike the other review queue views, published items are displayed here.



Version Inventory

Show Everyone's Content | Condensed View | Color Key

Status: All	Name	Version	Creator	Owner	Supervisor	Created	Modified
Content Element							
Approved	Home	1	DP	SA	SA	11/12/04 5:06 PM	01/31/06 4:44 PM
Approved	Home	3	DP	BDW	SA	12/20/05 11:27 AM	01/27/06 5:31 PM
Approved	About: Borderless Consulting	2	DP	DP	DP	01/13/06 12:35 PM	01/13/06 1:21 PM
Pending	Home	12	DP	DP	SA	01/31/06 2:47 PM	01/31/06 2:47 PM
Pending	Home	4	DP	DP	SA	12/20/05 1:32 PM	01/27/06 5:31 PM
Pending	Home	2	DP	DP	DP	12/09/05 4:56 PM	01/27/06 5:31 PM
Pending	About: Approach	2	DP	SA	SA	12/12/05 4:02 PM	01/26/06 5:29 PM
Published	About: Approach	1	DP	SA	SA	12/09/05 5:50 PM	01/26/06 5:29 PM
Published	About: Borderless Consulting	1	DP	DP	DP	01/13/06 12:16 PM	01/13/06 1:21 PM
Published	About: Overview	1	DP	DP	DP	11/11/04 11:36 AM	12/20/05 12:07 PM
Published	About: Colleagues	1	DP	SA	SA	11/03/04 2:04 PM	12/15/05 4:18 PM
Published	About: History	2	DP	SA	SA	02/24/05 2:46 PM	12/15/05 4:01 PM
Published	Points of View: Issues & Opportunities	1	DP	SA	SA	11/11/04 11:40 AM	12/15/05 3:56 PM
Published	Home: Contact Sidebar	1	DP	DP	DP	12/09/04 12:17 PM	09/14/05 11:40 AM
Published	Payment Dynamics: Who Can Benefit	1	DP	DP	DP	11/11/04 11:57 AM	02/03/05 1:57 PM

You have the ability to toggle between:

My Content (default view): Only shows items with versions that you own, supervise, or created

Everyone's Content: Shows all items

You have the ability to:

Filter by Status: Choose a version status from the filter dropdown to determine which status items are display (ie: published items only)

Sort by Column Heading

The Queue is broken up into the following columns:

Edit Buttons: Links to allow you to edit the version selected and only show for users who have permission to access these areas.

 **Edit Icon:** link to the form object (ie: content element) section WYSIWYG edit view for that version

 **Version Management::** link to the version management review queue view (see below for functionality)

Status: A dropdown of all available status items. If you do not have permission to edit the status, the dropdown is disabled.

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Name: The version label.

Version: The version number.

Creator: The user who created the selected version

Owner: This is a dropdown of all possible owners for the selected version. Changing the dropdown will automatically update the version's owner. If you do not have permission to change the owner, this dropdown is disabled.

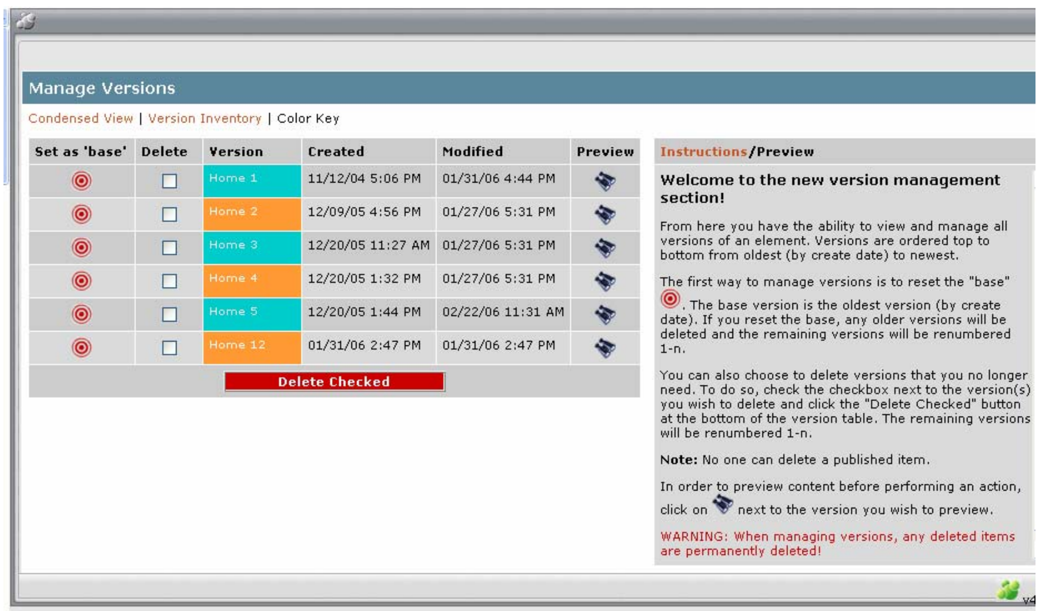
Supervisor: The supervisor of the selected version.

Created: The date the selected version was created.

Modified: The date the selected version was last modified.

View 4: Version Management

This view can only be reached by clicking the version management icon in either the condensed or version inventory view. This icon is available only if you have permission to delete a version in this set. This is the only area where versions can be deleted.



The purpose of this view is to allow you to manage versions in two ways:

Set a New Base Version

Delete Versions

The Queue is broken up into the following columns:

Set as Base: The "base" version is the oldest version of an item. For example, if you have Version 1 – 5, version 1 is considered the base version. If you determine that the first 2 versions are not needed anymore, you can reset the base version to be version 3. In doing so, version 1 and 2 will be deleted. Version 3 – 5 will be retained but they will be renumbered so they are now Version 1 – 3. **Note:** you cannot set any version newer than the published version as the new base because this would cause the published version to be deleted. This column is only visible if you have permissions to change the base version.

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Delete: This column houses a checkbox- when checked it indicates that you wish to delete this version. Multiple versions can be deleted at one time by checking this checkbox for each version you wish to delete. However, checking them off is only the first step. In order to actually delete these items, you must click the "Delete Checked" button at the bottom of the page. If the base version is deleted, the oldest active version will become the new base version. After deletion, the remaining active versions will be renumbered 1-n. Published items cannot be deleted.

Version: The version name followed by the version number.

Preview: Click this icon to display a preview of the version's content in the "Instructions/Preview" container to the right.

Instructions/Preview: Default display: instructions on how to use the version management section. Also displays a preview of version content upon click of the preview icon.

Working with Tools

When you are not working with body content elements to manage your site content, you will most likely be working with a data entry tool that was built custom for your installation by Digital Positions. Commonly types of content that are good candidates for custom tools are things that are iterative in nature and will always display with the same formatting such as press releases, events or a listing of clients.

Browsing through Records

i3SiteTools provides an easy-to-use system for finding the content records you create in a custom tool. This index, or browse screen functions exactly the same for all the tools you will use.

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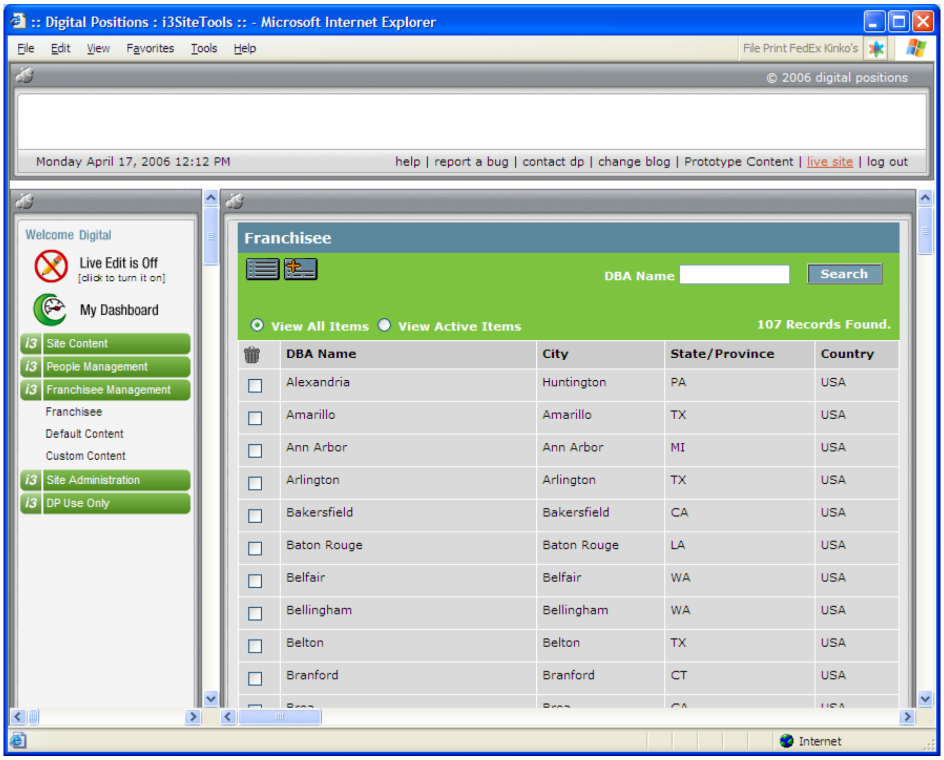
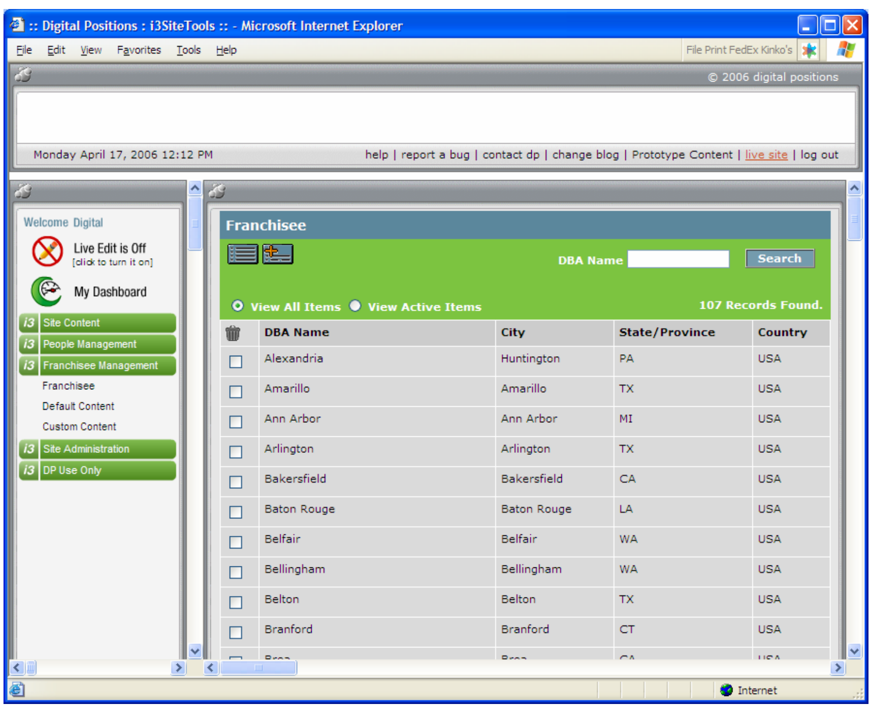
List View / Detail View

Much like a file explorer window on your personal computer, **i3SiteTools** provides a couple of ways for you to view your records. The default and most robust view is the detail view pictured below.



Much like a file explorer window on your personal computer, **i3SiteTools** provides a couple of ways for you to view your records. The default and most robust view is the detail view pictured below.



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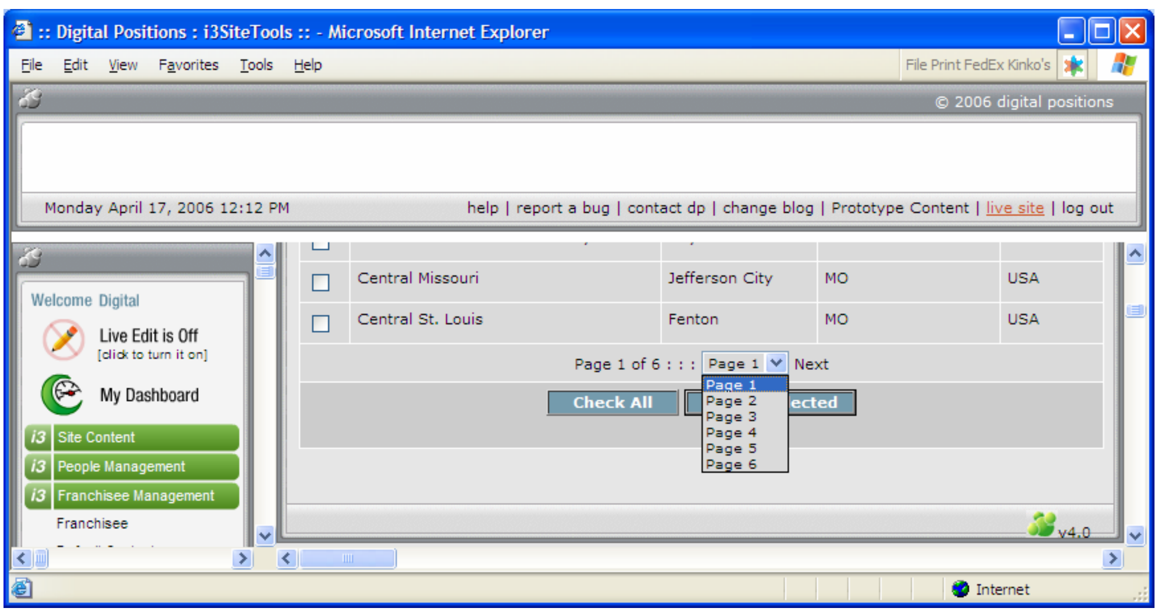
The detail view allows you to see several columns of data about every record to easily identify it for editing. The list view allows you to view more records at a time because it displays the value of only one field for each record and wraps into three columns.

Column Sorting

In detail view, a quick way to find the record you are looking for may be to sort by a particular column. For instance, if you have a tool for storing franchisee locations and you want to see all of the locations for Georgia, you can click the State/Province column heading and the records will be re-sorted by State/Province name in ascending order. Now you will see all of the Georgia franchisees grouped together. If you wanted to see all of the franchisees in Wyoming, you would click the State/Province column header once again which will reverse the alphabetical sort. Each column heading link acts as a toggle button for sorting the column of data beneath it and is very useful for working with tools that contain a lot of records. The column you are sorting by has a blue background color in the column heading text.

Paging through Records

When you have more than twenty records in any tool, the result paging mechanism will automatically turn on, showing you the first twenty records in the tool and displaying paging navigation at the bottom of the screen. The navigation will indicate how many pages of records you have total and which page you are currently on. You can page through the records in a linear fashion using the "previous" and "next" links or you can use the drop-down menu to jump to any page.



Searching for Records

If you prefer, you can search for records on any tool index screen. Typically, you are only given one field to search on and it is usually the most logical name identifier field. You can request to have other fields made available for searching. The searches are not case sensitive and will only look for exact matches within the text of the field you are searching. For example, searching for "as" will return

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"Texas" and "Arkansas". If your search returns only one result, you will be automatically taken to the edit screen for that record.

Bulk Deleting Records

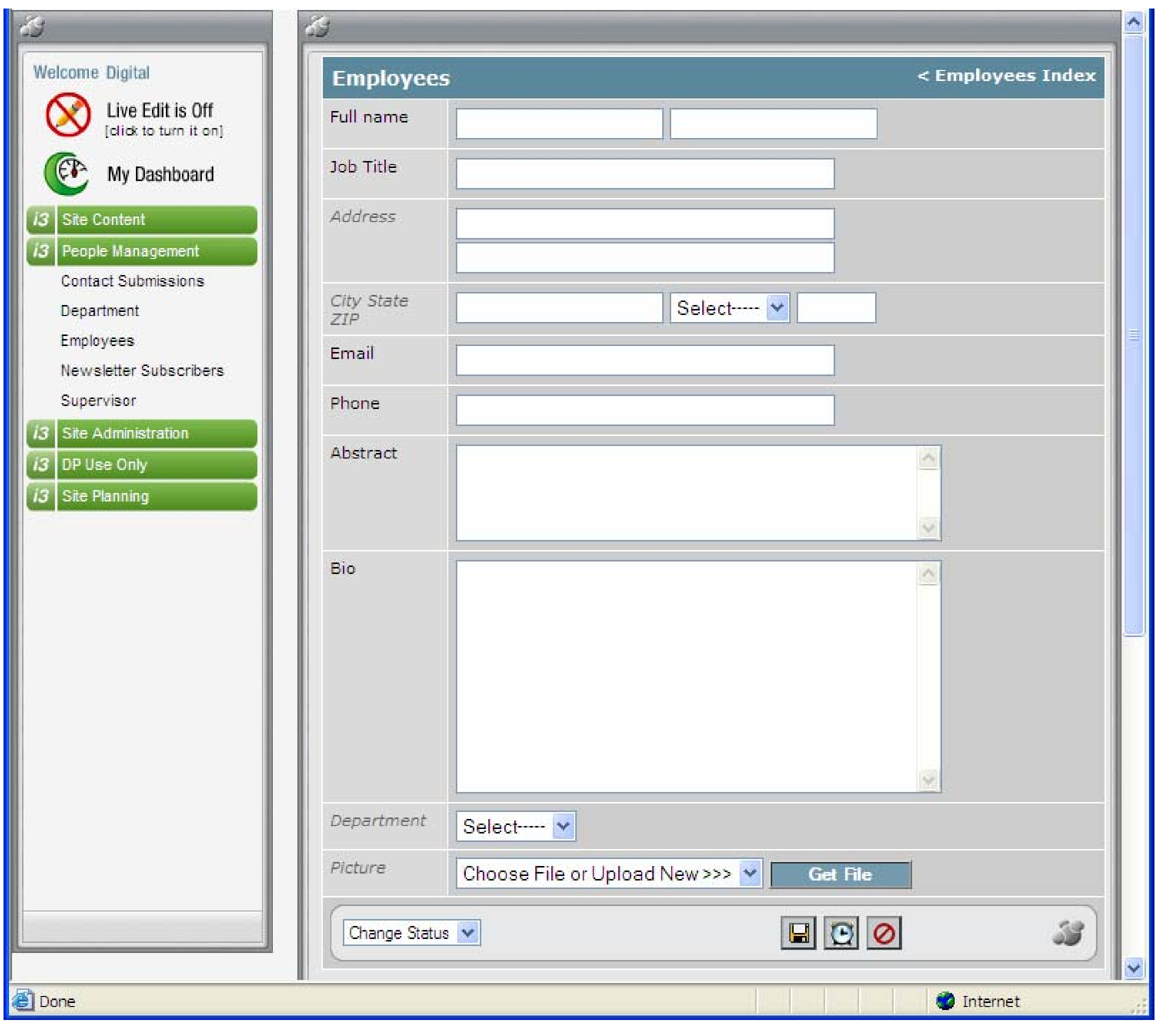
Tools that do not use versioning allow you the ability to "bulk delete" records from the index screen. Simply check off the record(s) you wish to remove and click the "Delete Selected" button at the bottom of the page. You will be prompted with a confirmation screen to insure that you are certain you wish to delete the selected records. Note: not all users may be given delete permissions to all tools.

Working with Data Entry Forms

The heart of any custom tool is the actual data entry form. These forms are all functionally the same, so once you learn to use one you should have no problem with others. These forms are a simple way for you to easily get validated information into your database in a uniform way using common web-based forms that you are probably already familiar with.

Adding New Records

To add a new record from the index page of the tool you are working in, click the "Add" icon and you will see a screen similar to the one pictured below.



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The fields you see in this form represent fields in a table or tables in your site installation database. Some of the fields are required (in black text) and some of the fields are not (in gray italic text). Simply fill out the form with the information you wish to add to this record. If this tool is using versioning you will see a toolbar at the bottom of the form like the one pictured above. From here you can set the publishing status, schedule future publishing, save or cancel. If this tool is not using versioning, simply click the save button at the bottom of the form.

Tools can be customized to suit your needs so there might be some slight variance from tool to tool. All tools can be made to show an input confirmation screen before saving to the database so you can review before committing. Once your record has been saved, you will be redirected back to the index screen for that tool. Your new record is now stored in your site database and will show up according to your publishing rules (if versioning is used) on your public site by way of custom display handlers written by the Digital Positions team.

Editing Existing Records

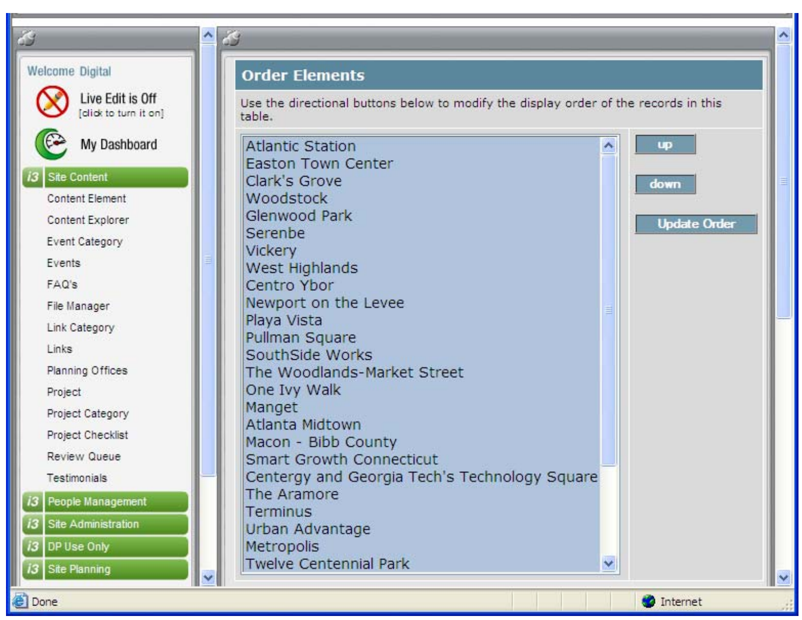
From the tool index screen, simply click on the text for any record row to be taken to the edit form. The edit form looks and behaves exactly as the add form with one exception: the fields are pre-filled with the data for the record you clicked on.

Deleting Records

For tools that are not using versioning you can bulk delete records from the index screen, or delete records one at a time by clicking on a record from the index and then clicking the red “Delete” button at the bottom of the Add/Edit form. To delete versioned tool records, you will need to use the version inventory manager.

Setting Display Order for Records

Optionally, some tools may allow you to set the order you would like the data records to be displayed on your site. Commonly ordinals are used when you wish to arbitrarily sort records other than in ascending or descending by one of the columns in the tool. This ordinal value, which is simply a number, is set via a basic form that allows you to visually shuffle records. If the tool you are working with has this capability, you will see this icon:  in the upper left corner of the screen next to the add button. Clicking on the ordinal button will take you to a form similar to the one pictured.



In the scrolling menu you will see all of the records currently in the tool. Select one of the records and click the “up” or “down” arrow to shuffle its position in the display order. When you have reordered the records to your satisfaction, click “Update Order” to save.

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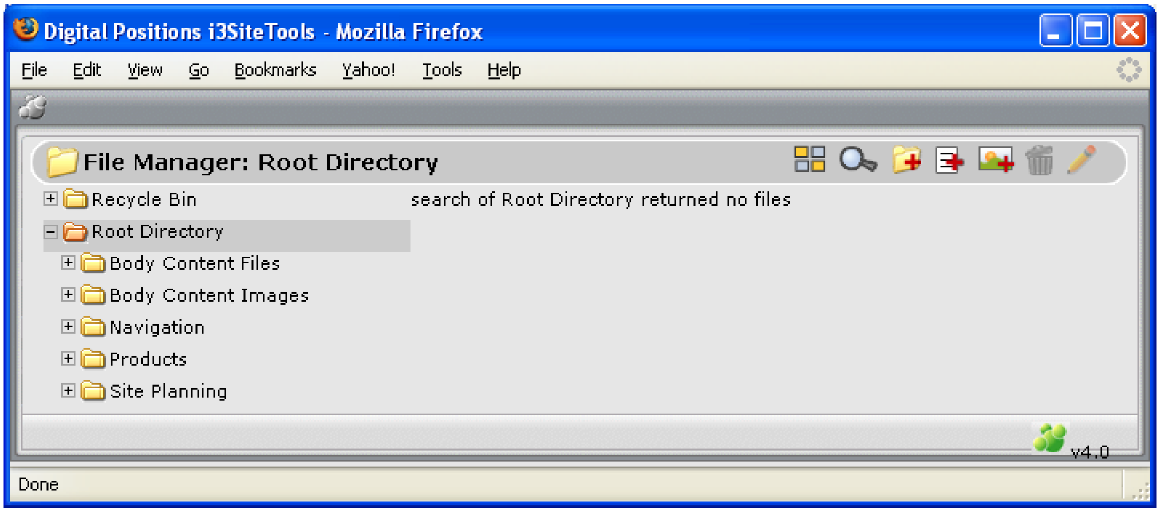
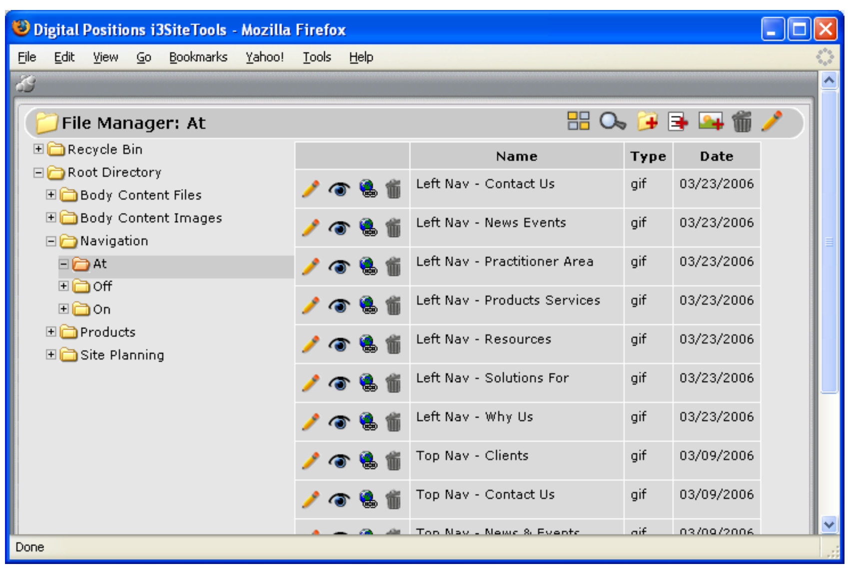
Working with Files in File Manager

The File Manager is a tool that allows you manage external content related to your site. You can load and organize files into folders as you would on your local machine. To open the file manager, use the left side navigation under the Site Content category click on the File Manager link. This will open a view of the file and folder organization for your site. The File Manager interface will always be the same regardless of whether you browse to it directly from the main navigation, open it from Live Edit, or from a custom tool. The screen shot below depicts what a typical File Manager looks like.



Browsing Files

To see the contents of individual folders, just click on the folder to the left. This will show you the contents within this folder and list all files at this level. The file manager always opens showing the Root Directory. Clicking on a new folder will open it and display its contents. When you click on a folder that is at the same level as your current folder, the current folder will close and the new folder will open. If a folder is a sub-folder of the current folder, it will open and show its content. Folders will always appear on the left side of the screen, and files (if any) will appear in a list on the right.



Each file will appear on a separate line displaying relevant information about itself. This information is stored in a database.

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WARNING: The actual name of the file as stored in **i3SiteTools** is different than is displayed in the 'Name' column. This enables efficient database manipulation of file storage, yet allows for descriptive information to be displayed for the user.

There are a number of options when displaying and working with files and folders. Each of these is managed through the icon buttons in the header and to the left of each file listing.

List view / Thumbnail view

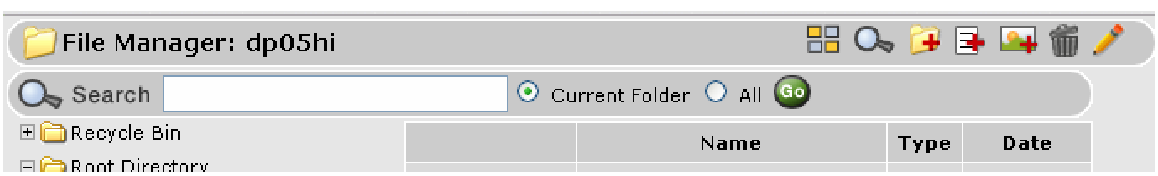
This button in the top header applies only to image files; it toggles whether or not thumbnail images are displayed for each file. If you chose to create thumbnails, these are used for display. Otherwise images are compressed to a manageable size and displayed in miniature next to each file name. To switch back to standard list view without thumbnails, simply click this icon: abc . At any time you can view a full size image by clicking on this icon: .

Column Sorting

The file listing can be sorted on three major categories: Name, Type, and Date. This is done by clicking on the category header titles of the same name. The first click will sort ascending on that category, and subsequent clicks will reverse the sort order. Files of like type or date are grouped together in the order in which they were entered.

Searching

In the top header bar there is a magnifying glass icon. Clicking on this button opens a new search bar below the main header.



Type your key word in the text field and click on the Go button. This will initiate a search of all file names for an exact match to the word you typed in. If nothing is found, you can refine your search. Clicking on the magnifying glass at the top a second time will hide this search field (your search criteria will still be set until you change your search). To again list all files, either click on the current folder in the left folder listing, or clear the search field and click the Go button

WARNING: The search matches the exact word(s) typed, including any spaces. Searches are not case sensitive.

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Organizing with Folders

To manage your files it is often convenient and highly recommended to group items of a similar nature together in one place. This not only makes it easier to find files, but it also helps to maintain organization. All path information for nested folders is maintained in the database. Folder management is achieved through the use of several buttons in the header.

 Creates a folder.

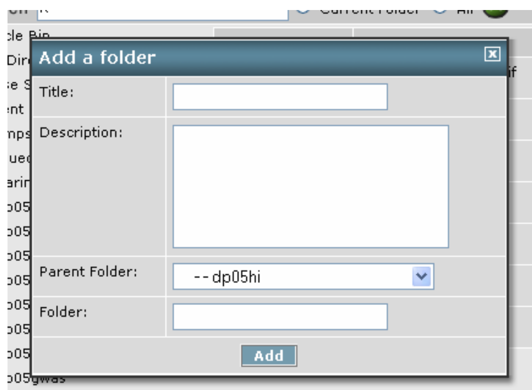
 Deletes a folder.

 Edits the properties of a folder.

Each of these buttons will open the appropriate dialog for performing each action.

Creating Folders

To create a new folder click on the icon with the plus symbol . This opens the new folder dialog. As seen here there are several fields that you will need to fill in for each folder. The first of these is the **Title**, which is the "friendly" name of the folder that you see on the folder tree on the left of the screen. This name is user defined, and as with files, the actual folder that is created on the system is given a different name that insures it is unique and makes it accessible to **i3SiteTools** scripts.



The next field is an optional **description** that can be used to explain and define what the particular folder is used for.

Next you need to select the parent folder. This determines how the folder is nested (where it is located in the folder hierarchy). The default parent will always be set to the parent folder of the currently selected folder. You can select any folder to act as the parent folder, just be consistent in organizing you folders so that others can easily navigate to your content. The last field is the actual name that will be appended (along with some database tracking numbers) to create the folder name that gets written to the computer. This name should <u>not</u> contain any spaces or special characters that you might have entered into the Title field. Common practice is to set the Folder and Title fields to be similar and easily recognizable. For example, a folder with the Title: White Papers might have a folder name: "whitepapers", or "white_papers".

Editing Folders

By clicking on the icon that looks like a pencil , you can edit the properties of the currently selected folder. The dialog that opens is the same dialog that you fill out when you create a folder. In this case the current values of the current folder are all pre-filled with values that were initially assigned. You can edit or change any or all of these values. It is in this dialog that you can "move" a folder by assigning a new parent folder. You can cancel at anytime by clicking on the 'x' at the top of the dialog, or save your changes by clicking on the button at the bottom.

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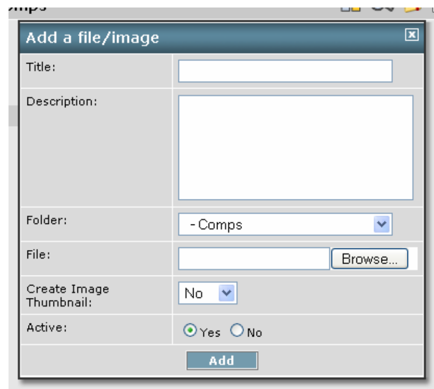
Deleting Folders

When you click on the trash can icon in the header, this indicates that you intend to delete the current folder. An alert message will pop up asking you to confirm that you want to delete the folder. Like in the Windows operating system, deletion is not really "permanent". The act of deletion essentially moves the folder and all its contents into the Recycle Bin. If you select the delete button for a folder that currently resides in the Recycle Bin, it will be **permanently removed** from the file system, and any files it contained will be erased.

Working with Files

As with folders discussed above, there are similar controls for adding and manipulating files. There are several other things you can do with files in addition to add, edit and delete functions. If a file is an image, a full size view can be seen by clicking on the eye icon .

Adding new files



There are two ways to enter files into the file system (each one is equivalent). There are two buttons that will open the add file/image dialog box and . This dialog box is similar to the folder dialog box with two additional fields that apply specifically to files.

The first field is the **Title** field. This is the display name that will appear in file listings. The next field is an optional **description** for the file. Next is where you can select which folder you want this file to reside in. The default value is going to be set to the currently selected folder, but you can change this to reflect whatever folder you want. The next field is where you identify what file it is you want to copy into the file manager (the original file wherever it is located remains unchanged). You can either type in the path and file name or click the Browse button and find and select the file interactively. The Browse button opens a native operating system file selection tool that will allow you to select the file of your choice.

WARNING: When uploading any file from your local machine, you must insure that the file you wish to upload does not have any spaces or special characters other than underscores (_) in the name. Improperly named files will not upload.

The next selection field allows (for image files only) you to create a thumbnail image if desired. The final field is a flag that indicates whether the file is marked as active or inactive. This field is only of use if the display handler script that shows your image on the web site is set up to distinguish this value.

Editing existing files

When you click on the pencil icon to the left of any file listing, the edit dialog opens. The edit dialog is the same as the add image/file dialog, but with the fields pre-filled with the current values associated with this file. You can change any or all

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these values, including the actual file that the current file represents (it will swap the contents of the file while keeping the original naming that was set). If you didn't choose to create a thumbnail previously, you can change your mind at this point and choose to create one. If you want the "move" the file simply change the parent Folder selection.

Deleting files

As with folders, when you click on the trash can icon, you are implying that you wish to delete the file from the current folder (remember that this is a copy of the original file that was selected, and that original file will remain wherever it is located). Again, a prompt will appear to confirm that this is what you want to do. The file will be moved to the Recycle Bin, so if you change your mind you can always move the file back to its original (or any other) location. When you select to delete a file that is currently in the Recycle Bin, it will be **permanently removed** from the file system.

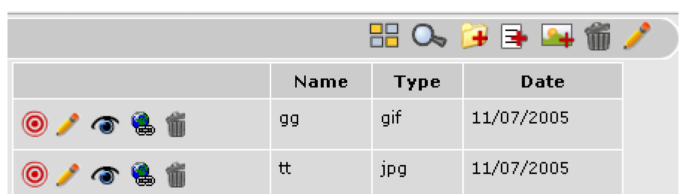
Creating Thumbnails

As described above, thumbnails can either be created when you first load the file, or at any subsequent time through the edit dialog. If you choose to create a thumbnail, you can select the scaling percentage from the list. Keep in mind that the larger the percentage, the larger the file size will be for the thumbnail image. Ideally, thumbnails should be no larger than 80-100 pixels in either height or width. **Note:** it is a good idea to make a note of the percentage you use for making your thumbnail, so that later if you want to replace it with another image, you can re-create the thumbnail and insure that it will conform to the previous size. A good place to do this is in the description field for the image.

Linking and Referencing Files

Since files are stored in the file system with database friendly naming, the name that appears in the list does not reflect the actual name and path.

Selecting a file from a data entry tool screen



Some of the tools you will be using in **i3SiteTools** will require you to upload an image or other file type to be associated with a particular record. For instance, you may have an employee tool that requires you to upload a "head shot" image for each employee. In this case, clicking the "get file" button beside the field will pop up a File Manager window where you can upload a new image or browse to an existing image. Beside each file listing you will see a "target" icon. Clicking on this icon selects the file as your choice for the value in the field in the current tool where you are working and closes the File Manager window. You will only see the target icon when you are accessing File Manager from a tool.

Getting the path to a file in File Manager

Often when you are working with body content on your site, you will want to link to a document in File Manger. For instance, you may reference a specific white paper

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PDF and want to provide a link so the user can view it. You can easily get retrieve the link path to any file in File Manager by clicking on the link icon associated with that file listing. The dialog that opens gives two alternative paths to the actual file. The first option is the relative path and should be used when linking to a file anywhere from within your current web site.

The second path is an absolute path that can be accessed from anywhere on the Internet and should be used if you are referencing the file somewhere beyond your current site – in an email for instance. Highlight the entire path in either field you choose to copy it to your clip board (Ctrl + C). You can then paste it (Ctrl + V) into the document you are working on.

Glossary of Terms

Absolute Path/URL – A fully qualified address to a location on the Internet. Example: http://www.d-p.com/whyus/index.cfm

Anchor - The equivalent of a bookmark within a page. Typically you will use these on very long pages. Commonly, you will see these used on FAQ content where the question has a hyperlink that looks like this: currentpage.html#answer1. Any text string following the # sign in a hyperlink refers to a unique anchor within an HTML page. Anchors must be unique. The HTML syntax is: <a name=”myAnchor”>This Anchor</>

Admin Tool - A backend form where dynamic content is entered. An admin tool resides in your **i3SiteTools** backend. You can add, edit, and delete dynamic content here.

Base Version – The oldest version in a version set. The Base Version is always version number 1.

Body Content - Refers to a single field of HTML formatted content stored in the database. Body Content is commonly used to store information that does not change often, such as an About Us page.

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Browse – Usually refers to the act of surfing the internet using a web enabled application that formats remote information and displays it locally. This time is also applied the act of searching a file system to locate a specific file.

Cascading Style Sheets (CSS) – A stylesheet language used to describe the presentation of a document written in a markup language such as HTML.

Change Request - When a client wishes to change any aspect of the design and/or functionality of a project which exceeds the previously approved scope as it was defined in the functional specification document he must issue a change request. After submitting a change request, Digital Positions will provide a cost estimate to do the additional work.

Comp - When a graphic designer creates a look and feel or "composition" for your web site, she presents a "comp" usually in the form of a JPG. This comp should visually represent the wireframe, navigation and suggested functionality for the site. Commonly a designer will deliver several comps to choose from.

Container - Refers to an area within the layout of a template that can hold either an assigned body content element or a display handler. Containers allow a single template to dynamically display many combinations of content without having to modify the layout of the template.

Contextual Navigation - -needs defining

Dashboard – The initial view in the Content Screen after successful login. This area contains news, information from Digital Positions and the Dashboard View of the Review Queue. The Dashboard serves as your starting point for all **i3SiteTools** sessions.

Dedicated Landing Page - -needs defining

Display Handler - Refers to the custom script used to display content that typically has multiple attributes, or fields that require more than one layout, or view on the web site. Examples of typical display handlers are Press Releases and Event Calendars.

Domain Name (URL) - The address of your site such as 'mysite.com'. A site may also have a sub-domain such as 'example.mysite.com'. Your domain translates to an IP Address that is unique to the server hosting your site.

File Manager - A tool used to manage files you upload to your **i3SiteTools** site. Through this tool you can upload, edit, delete, and organize files on your site. You can also create thumbnails of your images.

Footer - Content at the bottom of a document. The footer usually contains copyright information. It may also contain text-based navigation or contact information.

Global Navigation - -needs defining

Hypertext Markup Language (HTML) – A markup language used to create documents for the World Wide Web.

IP Address - Needs defining...

Live Edit - A method for editing content on an **i3SiteTools** site that allows the user to work on the copy in the context of where that copy will appear on the site. When in this mode, a pencil icon will appear over editable content areas of the site.

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Clicking the pencil icon will allow the user to modify the content in a Word-style editor.

Local Navigation - -needs defining

Naming Conventions – A pattern for naming multiple files in a similar fashion to improve your ability to locate the files and/or reference them in a dynamic way. For example, if you are naming a series of navigation buttons for the homepage you might use something like this: homenav_about.gif, homenav_contact.gif, etc.

Recycle Bin – A temporary storage folder for files and folders marked for deletion and moved out of the folder pattern in the root directory.

Relative Path/URL – An address that is local, or relative to the page containing the link. Example: /whyus/index.cfm OR ../whyus/index.cfm if the linking page is nested in a folder/section parallel to the whyus folder.

Review Queue - A tool used to review and manage versioned content.

Rich Text Editor – A browser based text field that allows users to modify HTML using common text formatting controls such as bullets, bold, italic, etc. This type of functionality is sometimes referred to as WYSIWYG (What You See Is What You Get).

Root Directory – The lowest level of organization of the file structure; think of it physically as the filing cabinet that contains all the other folders and documents.

Sidebar - Refers to a columnar content area in a web template that resides either to the left or right of the main content area. Commonly sidebars are used to display banners, and teaser headlines for content such as news, events and press releases.

Supplemental Navigation - -needs defining

Template - Refers to the HTML page layout used to display a specific look and feel that was created by the designer. Commonly a web site will use anywhere from 1 to 5 different templates to display different sections and varying pieces of functionality.

Thumbnail – For image files, this refers to a smaller (usually compressed) version of a larger image. Thumbnails are often used for previewing a files contents, and due to their size (both physical and memory) they can be transferred and display more rapidly than their larger counterparts.

Version – needs defining

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