Daily Living Toolkit

Web Content Management System

Intended Audience:

This document is intended for persons whom have been granted access to the administrative portion of the Daily Living Toolkit (DLTK) website content management system (CMS) and intend to make changes to the existing content or add new content.

Purpose:

The purpose of this document is to provide step-by-step instructions for operating the CMS developed for the Daily Living Toolkit website and provide an understanding of the site layout and how content changes will affect each page.

Concepts:

It is important to understand the hierarchical layout of the website. The site does contain a number of static content pages such as the landing page, the Links, Contact Us and About Us pages are also static. The Living Toolkit pages are dynamic and an administrator can change, rearrange, add and delete the content and media that comprise these pages.

Hierarchy:
Top Level: Single Daily Living Category
Second Level: All pages in a single category.
Third Level: All articles on a single page.

Adding a New Category

This section explains step-by-step instructions to add a new category.

1. Start by logging into the Admin section by clicking the “admin” button on the Home page of the site. Or if the admin button has been removed, append “admin” to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.
2. Once logged in you’ll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content

c. Add A Web Page
d. Edit A Web Page
e. Add User Type/Organization
f. Update Contact Form Email Address
g. Update Address and Phone Numbers
h. Update Calendar Events
i. Upload A File
j. Add Account
k. Edit Accounts
l. Search Historical Data
m. User Documentation
n. Logout

3. Click the "Add A Ctegory" link to perform the action we are explaining here.
4. On the "Add a New Category" form the first items to enter is the category name you want to add.
5. Next enter the sort order, this is the order you want the categories to be displayed in. No 2 categories should have the same sort order number.
6. Next check the box to activate the category if you want it immediately visible in the drop down menu of the live web page.
7. Then click "Add" to finish the action

Adding a New Page

This section explains step-by-step instructions to add a new page to a category.

Items to be aware of

1. Pages cannot be shared between categories.
2. New categories cannot be added via this interface.
3. Associated images and documents should be added after the page is created.

Now that you understand some of the limitations to the CMS we'll explain how to add a full page.

1. Start by logging into the Admin section by clicking the "admin" button on the Home page of the site. Or if the admin button has been removed, append "admin" to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

2. Once logged in you'll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content
    c. Add A Web Page
    d. Edit A Web Page
    e. Add User Type/Organization
    f. Update Contact Form Email Address
    g. Update Address and Phone Numbers
    h. Update Calendar Events
    i. Upload A File
    j. Add Account
    k. Edit Accounts
    l. Search Historical Data
    m. User Documentation
    n. Logout
3. Click the "Add A Web Page" link to perform the action we are explaining here.
4. On the "Add Page" form the first items to select is the category you want to add the page to. Click the drop down arrow and select one of the available categories in the "Page Group" form field.
5. In the "Page Title" form field, type the name of the page as you want it to be displayed on the web page. This title should be topical and help a user locate information about a specific subject. *Required Field
6. The "Sort Order" form field associated with the page title determines in what order the page is displayed in reference to other pages in the same category. The first page in a category should be 0. There is no limit to the number of pages that can be in a category but the pages must be sequential in order to scroll from one page to the next or previous page. If you skip a number on the sort order the scroll feature will be broken and display a "page not found" error. *Required Field
7. If you want the page to be immediately available for viewing on the live site, click the "Make Page Active" form field check box.
8. In the "Article Title" form field type the name of the article as you want it to be displayed on the web page. *Required Field
9. The "Sort Order" form field associated with the article title determines in what order the article is displayed in reference to other articles on the same web page. The first article on a page should be 0. There is no limit to the number of articles that can be on a page but the articles must be sequential in order to scroll from one article to the next or previous article. If you skip a number on the sort order the scroll feature will be broken and display a "page not found" error. *Required Field

10. If you want the article to be available for viewing when the page is made active on the live site, click the "Make Article Active" form field check box.
11. The "Do Not Display Article Title" form field checkbox should be used if you do not want the article title to be displayed on the page. An example of a need for this would be if the first article on a page should use the page title instead of a title of its own. This can help eliminate duplicate content.
12. The article content should be entered into the rich text editor provided for each article. The rich text java script applet has many features we will not explain here but if you want to learn more about the available options you can review the developer's documentation at http://www.tinymce.com/. A few of the tools we found helpful while inserting content are:
    a. Ordered Lists
    b. Unordered Lists
    c. Tables
    d. Hyperlink
    e. Underline/Bold/Italics

    For all elements above except tables, you can paste the content into the rich text editor, highlight the text you want to apply the element to and then click the corresponding button for that element.

    To create a table, click the table button. In the setup dialogue box choose the number of row and columns you want to be displayed. You can add table specific cell padding, text alignment, static width and height as well as a css class and table caption.

    Once the table is created use the arrow keys on the keyboard to move from cell to cell, or click in the cell you want to edit or add content to.

    This page can add up to five articles on the new page. More articles can be added in the "Edit Page" feature we will explain later in this document. *Required Field
13. The above items with "*Required Field" are required in order to add a new page. In the lower four article details boxes, if you enter a title, the sort order and rich text editor will be required to be completed as well. If you leave the article title field empty the remaining fields for that article can also be left empty.
14. Click "Add" at the bottom of the page to insert the content into the database and for use on the dynamic pages.

Editing an Existing Page

This section explains step-by-step instructions to edit an existing page to change existing text, add additional articles, images, PDF documents, page and article sort order, page and article status.

8. Start by logging into the Admin section by clicking the “admin” button on the Home page of the site. Or if the admin button has been removed, append “admin” to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.
9. Once logged in you’ll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content
    c. Add A Web Page
    d. Edit A Web Page
    e. Add User Type/Organization
    f. Update Contact Form Email Address
    g. Update Address and Phone Numbers
    h. Update Calendar Events
    i. Upload A File
    j. Add Account
    k. Edit Accounts
    l. Search Historical Data
    m. User Documentation
    n. Logout
10. Click the “Edit A Web Page” link to perform the action we are explaining here.
11. From the “Select a Category” page you can activate/deactivate an entire category by clicking the “Activate” or “Deactivate” button to the far right. Changing the category status immediately changes the live web site. You can also choose to edit pages in a category by clicking the “Edit” button to the rights of the category you want to make changes to.
12. Clicking the “Up/Down” buttons allows you to make immediate changes to the category sort order.
13. Clicking the “Edit” button allows you to make changes to the category in the same row to the left of the button.
14. Back on the “Select A Category” page clicking the “Pages” button allows you to change the sort order of the pages in the category by using the Up/Down buttons to the right of the page name you want to make changes to. You can activate/deactivate an entire page by clicking the “Activate” or “Deactivate” button to the far right. Changing the page status immediately changes the live web site.
15. After clicking the “Edit” button to the right of the page you want to make further changes to you will be presented with a list of articles for the page. Again here you can activate/deactivate each article to make immediate changes to the live web site.

16. Three other features available on this page are:
    a. Add an article with the “Add Article” button. Instructions for this page are in the “Add a Page” section items 5-14.
    b. Edit the page name by clicking the “Change Page Name” button.
    c. Edit the text, sort order and associated image for the articles.
    d. Add a PDF file for the page.
17. To add a PDF to be displayed as a download on the page, click “Associate Document”.
18. On the “Add a Document Download” page, use the drop down arrow next to the document name list to select from the available documents (Document upload for listing here will be explained later). Provide an explanation of the document and click “Submit”. The chosen document will now be downloadable from the live website when viewing the page you associated the document with.
19. From the “Select an Article” page clicking on the “edit” button will allow additional changes.
    a. Use the up/down features to change the sort order.
    b. Use the activate/deactivate features to change the article’s status.
    c. Use the “Delete” button to delete the article from the web page.
    d. Use the “Edit” button to edit the text and other contextual elements like lists, hyperlinks, tables and paragraphs using the rich text editor. This option also allows you to change the selection for displaying the articles title on the web page as well and change the title of the article.
    e. The “Associate Image” button work much like the “Associate Document” button at the page level, but it also allows you to select the image location. Position options are:
        i. Left – image will appear to the left of the text.
        ii. Center-Top – image will appear above text.
        iii. Center-Bottom – image will appear below text.
        iv. Right – image will appear to the right of the text.

Uploading Documents and Images

This section explains step-by-step instructions to upload PDF documents and images that will be displayed on the content pages.

Start by logging into the Admin section by clicking the “admin” button on the Home page of the site. Or if the admin button has been removed, append “admin” to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

1. Once logged in you’ll see a simple list of possible actions. These actions include:
    a. Add a Category

   b. Edit Home Page Content
   c. Add A Web Page
   d. Edit A Web Page
   e. Add User Type/Organization
   f. Update Contact Form Email Address
   g. Update Address and Phone Numbers
   h. Update Calendar Events
   i. Upload A File
   j. Add Account
   k. Edit Accounts
   l. Search Historical Data
   m. User Documentation
   n. Logout
2. Click the "Upload A File" link to perform the action we are explaining here.
3. On the "Upload File" page use the browse button to search your local computer for the file you want to upload to the site.
4. Select the file from the hard drive explorer and click "Submit".
5. The file will upload as long as the extension for the file is in this list: pdf, gif, jpg, jpeg, bmp or png. If the file type does not match these extensions the upload will fail.
6. The filename you choose must also be unique. If there is already a file by that name in the database and upload directory, the file upload will be rejected. If you previously uploaded an image and you need to replace that image with a modified image, upload it using a new filename. Then use the above explained "Edit A Web Page" explanation to associate the page or article with the new file.

Edit Home Page Content

This section explains step-by-step instructions to edit the dynamic content on the home page.

Start by logging into the Admin section by clicking the "admin" button on the Home page of the site. Or if the admin button has been removed, append "admin" to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

1. Once logged in you'll see a simple list of possible actions. These actions include:
   a. Add a Category
   b. Edit Home Page Content
   c. Add A Web Page
   d. Edit A Web Page

e. Add User Type/Organization
f. Update Contact Form Email Address
g. Update Address and Phone Numbers
h. Update Calendar Events
i. Upload A File
j. Add Account
k. Edit Accounts
l. Search Historical Data
m. User Documentation
n. Logout

2. Click the "Edit Home Page Content" link to perform the action we are explaining here.
3. On the "Update Home Page Content" page complete all of the text fields. You can add content just like the previous articles in paragraph, table, list, hyperlink or any other format available in the rich text editor.
4. Once the data is complete Click "Add".
5. The Home page dynamic content will be immediately visible on the home page.

Add and Edit User Accounts

This section explains step-by-step instructions to create and edit user accounts that will have administrative access to modify the web pages.

Start by logging into the Admin section by clicking the "admin" button on the Home page of the site. Or if the admin button has been removed, append "admin" to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

6. Once logged in you'll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content
    c. Add A Web Page
    d. Edit A Web Page
    e. Add User Type/Organization
    f. Update Contact Form Email Address
    g. Update Address and Phone Numbers
    h. Update Calendar Events
    i. Upload A File
    j. Add Account
    k. Edit Accounts
    l. Search Historical Data

m. User Documentation
n. Logout

7. Click the "Add Account" link to perform the action we are explaining here.
8. On the "Create Account" page complete all of the text fields. The email address will become the user's login username.
9. Ensure the "User Access Level" is set to "Administrator". At the time of this writing there is no use for the "User" access level and it may be removed in the future.
10. Click "Create" to complete account creation.
11. Once the account is created you can edit it from the "Edit Accounts" web link found on the home page of the admin section.
12. On the "Edit Account" page locate the user whose information needs to be changed. Click "Edit" and modify the fields that need to be updated. Leaving the password fields blank will update surrounding information and leave the password unchanged.
13. You can also reach the "Add Account" page from the "Edit Account" page.

Search Historical Data

This section explains step-by-step instructions to view site usage data.

Start by logging into the Admin section by clicking the "admin" button on the Home page of the site. Or if the admin button has been removed, append "admin" to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

1. Once logged in you'll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content
    c. Add A Web Page
    d. Edit A Web Page
    e. Add User Type/Organization
    f. Update Contact Form Email Address
    g. Update Address and Phone Numbers
    h. Update Calendar Events
    i. Upload A File
    j. Add Account
    k. Edit Accounts
    l. Search Historical Data
    m. User Documentation
    n. Logout

2. Click the “Search Historical Data” link to perform the action we are explaining here.
3. On the “Search” page there are 2 search options. However at the time of this writing only a search by date is functional. The search by user type may be implemented if a user type questioner is implemented.
4. To search by date, select and start and end date for your search and click the “Search” button to the right of the “Search by date” form fields.
5. The Results page will display the unique session ID the site generated when the associated user first connected to the web site, the page the user viewed, the time and date the page was viewed and the IP address the user connected from.

Add a User Type/Organization

This section explains step-by-step instructions to add User Type or Organization items used in tracking what type of user is browsing the web site and what organization they are from. This data will be associates with the user session and displayed in the reports if the user answers the questions when displayed with the popup question.

Start by logging into the Admin section by clicking the “admin” button on the Home page of the site. Or if the admin button has been removed, append “admin” to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

1. Once logged in you’ll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content
    c. Add A Web Page
    d. Edit A Web Page
    e. Add User Type/Organization
    f. Update Contact Form Email Address
    g. Update Address and Phone Numbers
    h. Update Calendar Events
    i. Upload A File
    j. Add Account
    k. Edit Accounts
    l. Search Historical Data
    m. User Documentation
    n. Logout
2. Click the “Add User Type/Organization” link to perform the action we are explaining here.

3. On this page you can view the status of the previously entered User Types and Organizations. Clicking the “Activate/Deactivate” button changes the status and immediately adds or removed the items on the live web site.
4. Click “Add” to add a new User Type or Organization. Enter the data you want to add in one of the available fields associated with the type of data you want to add, choose whether to activate the item for immediate use and click the “Add” button. Clicking the “Add” requires that one of the 2 text fields has data in it.

Change Contact Form Email Address

This section explains step-by-step instructions to change the email address used for sending “Contact Us” form data.

Start by logging into the Admin section by clicking the “admin” button on the Home page of the site. Or if the admin button has been removed, append “admin” to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

1. Once logged in you’ll see a simple list of possible actions. These actions include:
   a. Add a Category
   b. Edit Home Page Content
   c. Add A Web Page
   d. Edit A Web Page
   e. Add User Type/Organization
   f. Update Contact Form Email Address
   g. Update Address and Phone Numbers
   h. Update Calendar Events
   i. Upload A File
   j. Add Account
   k. Edit Accounts
   l. Search Historical Data
   m. User Documentation
   n. Logout
2. Click the “Update Contact Form Email Address” link to perform the action we are explaining here.
3. On this page you can view the current destination email address.
4. If you want to change the email address the messages are sent to type a new email address into the form field. If you want the data delivered to more than one email address, enter multiple email addresses separated by commas.

5. Click the “Update” button to save your changes.

Update Calendar Items on the Contact Us Page

This section explains step-by-step instructions to calendar items on the “Contact Us” page.

Start by logging into the Admin section by clicking the “admin” button on the Home page of the site. Or if the admin button has been removed, append “admin” to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

1. Once logged in you’ll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content
    c. Add A Web Page
    d. Edit A Web Page
    e. Add User Type/Organization
    f. Update Contact Form Email Address
    g. Update Address and Phone Numbers
    h. Update Calendar Events
    i. Upload A File
    j. Add Account
    k. Edit Accounts
    l. Search Historical Data
    m. User Documentation
    n. Logout
2. Click the “Update Calendar Events” link to perform the action we are explaining here.
3. On this page you can view the current Calendar events, move events up or down in the order they are presented. Activate/Deactivate an event or edit the event data.
4. To change the order he event is displayed in use the “Up/Down” buttons to change the sort order.
5. To activate or deactivate an event click the “Activate/Deactivate” Button.
6. The delete button will remove the item from your display.
7. The “Edit” button will allow you to modify an event.
8. The “Add” Button will allow you to add a new event.
9. The edit and add button are similar enough in functionality that they will be explained together.
10. Clicking either button allows you add/edit an event name, start date and end date, sort order and weekday. If the start and end date are the same the end date is not displayed,

however the end data should be set on every event. A one day event should use the same date for the start and end dates. The sort order determines in what order the events are displayed on the page, 0 being the first event displayed. The weekday is to help the user understand what day of the week the event occurs.

11. Click the “Add/Update” button to save your changes.

Update Address/Phone Info

This section explains step-by-step instructions to address and telephone number items on the “Contact Us” page.

Start by logging into the Admin section by clicking the “admin” button on the Home page of the site. Or if the admin button has been removed, append “admin” to the domain name in the address bar of your browser. Use the username and password supplied to you by the site administrator.

1. Once logged in you’ll see a simple list of possible actions. These actions include:
    a. Add a Category
    b. Edit Home Page Content
    c. Add A Web Page
    d. Edit A Web Page
    e. Add User Type/Organization
    f. Update Contact Form Email Address
    g. Update Address and Phone Numbers
    h. Update Calendar Events
    i. Upload A File
    j. Add Account
    k. Edit Accounts
    l. Search Historical Data
    m. User Documentation
    n. Logout
2. Click the “Update Address and Phone Numbers” link to perform the action we are explaining here.
3. On this page you can view and edit the current address and phone numbers displayed on the Contact Us page.
4. Click the Update button to save any changes.