

Content Management System User Manual

PREPARED FOR TRIAGE CONSULTING GROUP
12.20.12

VERSION 1.0

INTRO

About the CMS	2
Account Types.....	2

GETTING STARTED

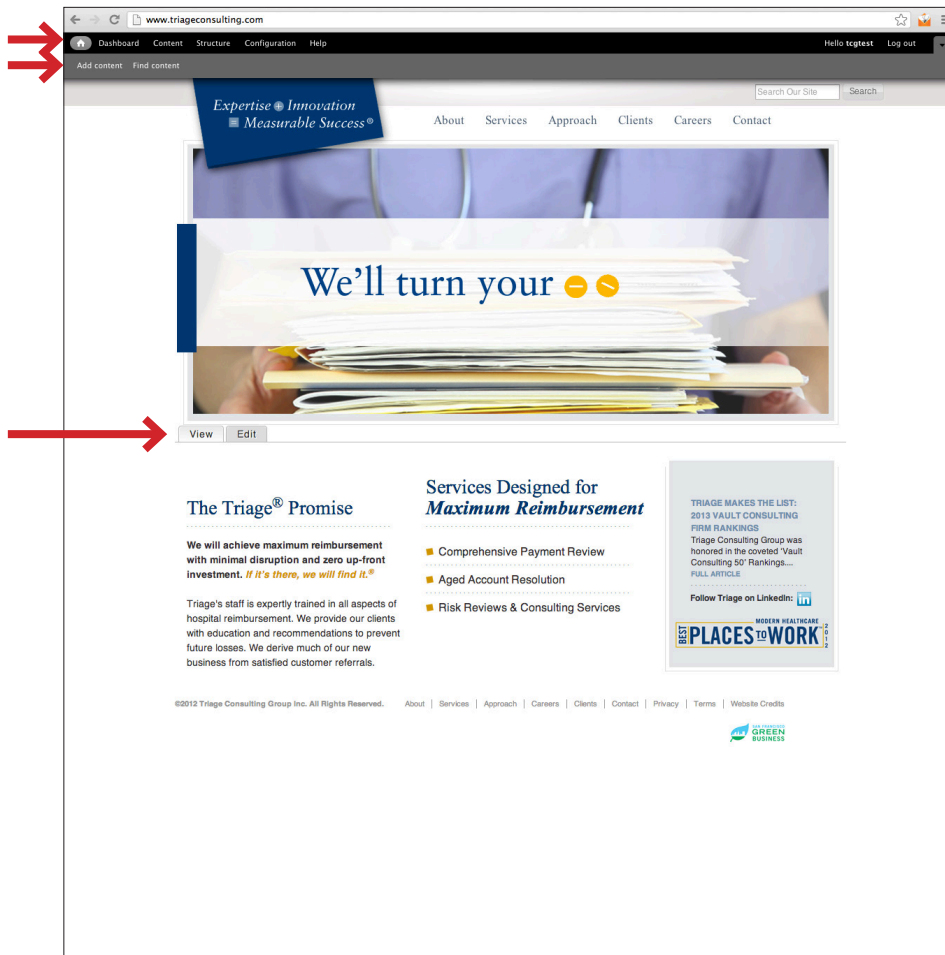
Logging In	4
Home Screen	4
Changing Passwords	5

BASICS

Navigating the CMS	6
Changing the Order of Listed Items/Elements.....	7
Creating a Hyperlink	7
Deleting a Hyperlink	7

EDITING/ADDING CONTENT

Editing Content, Basics.....	8
Editing Staff Bios	9
Adding Staff Member	10
Adding Campus Events	11
Adding Testimonials	12
Best Practices.....	13



ABOUT THE CMS

The content management system (CMS) is built using a Drupal 7 framework. The CMS allows for simple and quick combination in-line editing and WYSIWYG editing.

When you are within “editor mode”, you will see specific areas granting you access to make modifications. The top black bar allows access to almost every part of the website (dependent on your access level). Your user name and logout button is also located on the top right section of the black bar. The gray bar provides shortcuts to the most popular pages on the website.

View/Edit

You will also see “View/Edit” tabs that are otherwise invisible on the live website within the content areas of the pages. Clicking on Edit will give you the ability to edit that particular content area.

Gears Icon

Depending on your account type, hovering over certain areas of the site will also reveal gears that allow you to manage and update certain blocks of areas. *Tip: This ability is granted to admin levels only. Changes to these areas have universal implications across the entire site. Making changes to these areas should be made with strict caution.*

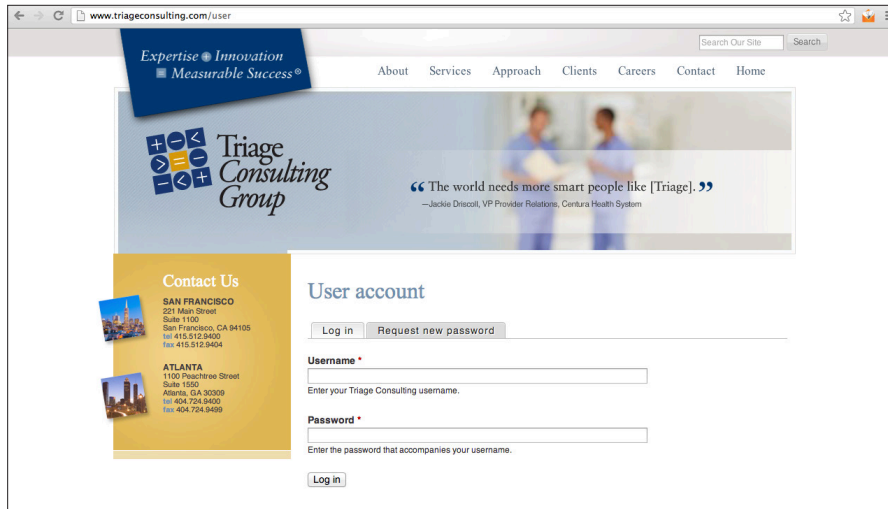
ACCOUNT TYPES

There are 2 account types within the CMS.

Atlanta Editor: This account type has limited editing capabilities. Their functions are limited to: updating, creating and deleting Atlanta employee bios.

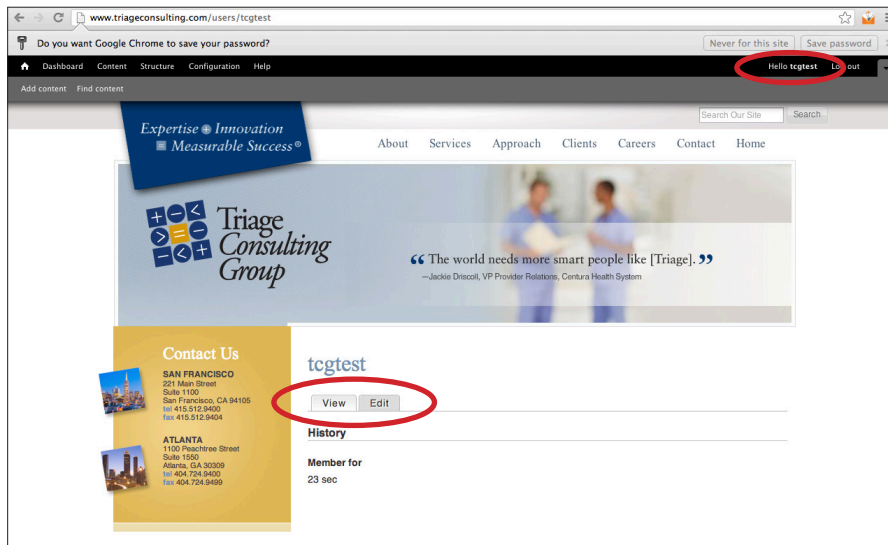
Triage User: This account type has extended editing capabilities. They are able to access and modify everything an “Editor” can as well as update content on all existing pages, update and manage San Francisco employee bios, campus events, and Triage testimonials.

Getting Started



LOG IN PAGE

1. Go to www.triageconsulting.com/user
2. Enter your username and password



HOME SCREEN

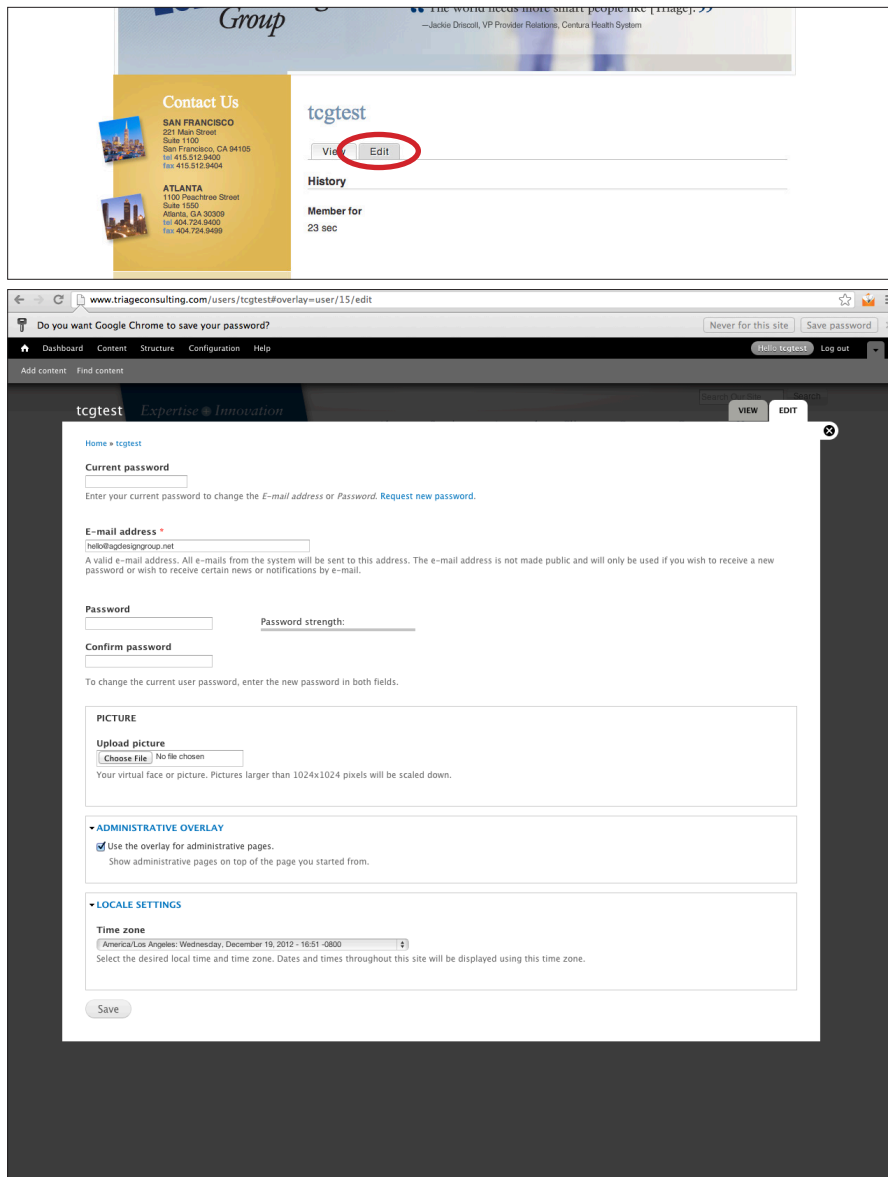
Once you've successfully logged in, you will be taken to your user home screen. You will see your user name at the top to confirm that you have logged in under the correct account.

A snapshot History will also show how long you've been a "member". Membership is defined by how long you have had access to the CMS.

Click the "Edit" tab to edit your user information. In this editing window you will be able to edit:

- Username
- Password
- Email address
- Photo

Getting Started



GETTING STARTED

CHANGING YOUR PASSWORD (UPON FIRST LOGIN)

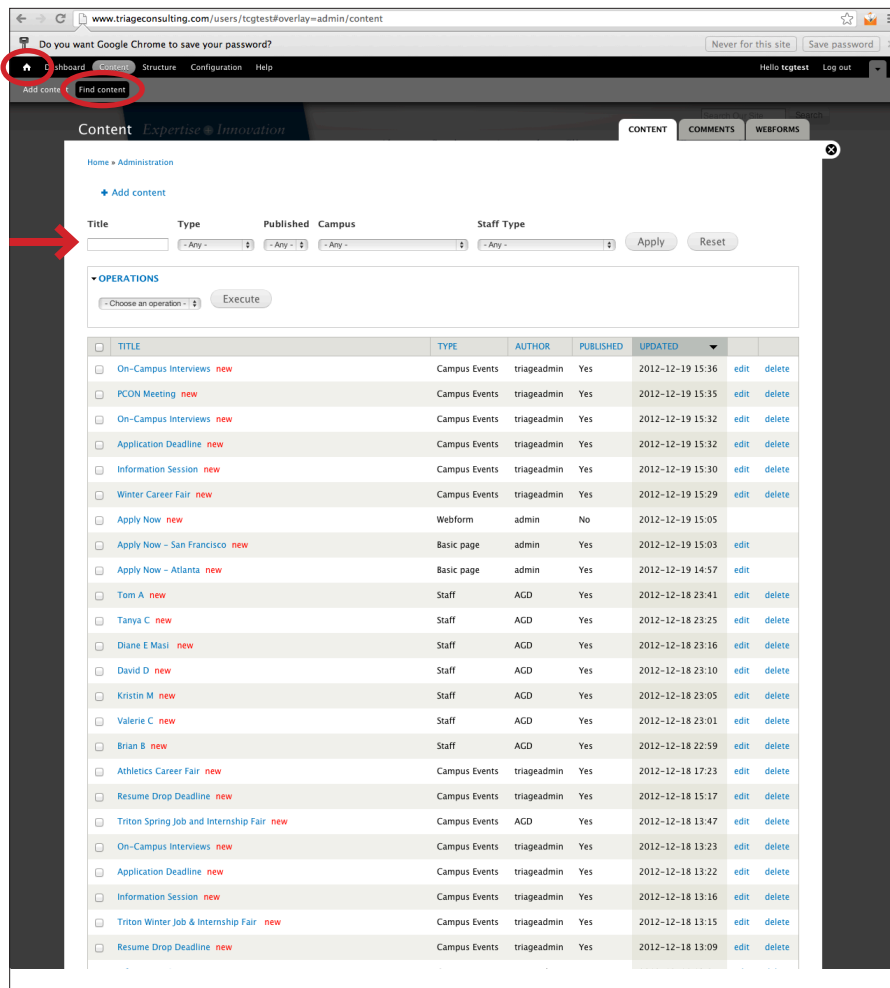
After login, AGD recommends that you change your password for security purposes. A default password is given to you upon account creation and should be changed upon first login.

1. Click on “Edit” from your home screen.
2. Enter your current, *default* password.
3. Enter your new password in the Password field.

Use the following criteria to make a strong password.


- Make it at least 6 characters
- Add lowercase letters
- Add uppercase letters
- Add numbers
- Add punctuation

TIP: To maintain security, AGD encourages you to change/update your password frequently and never share your password with anyone.



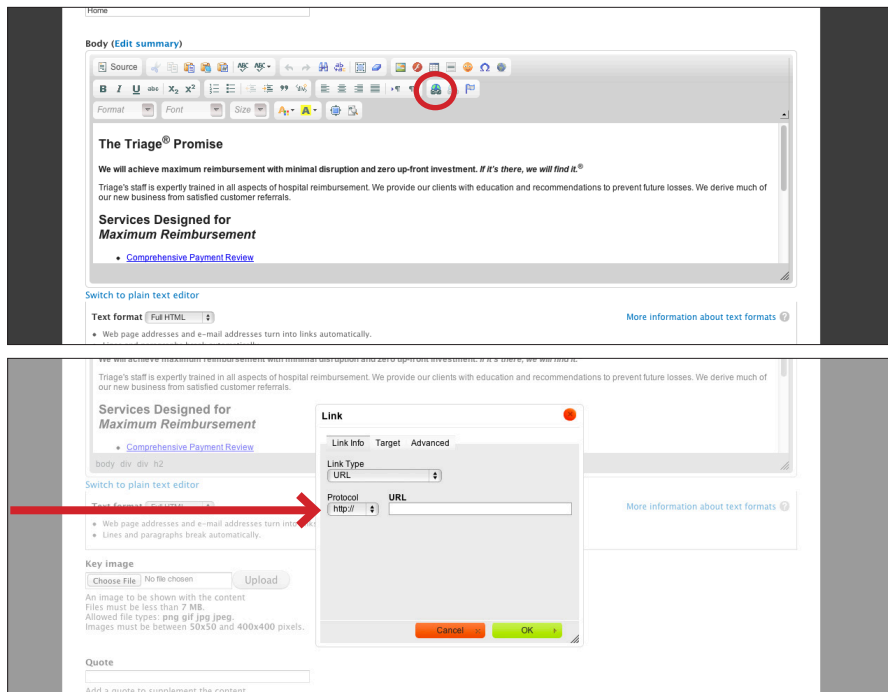
NAVIGATING THE CMS

You can navigate the website's CMS a few different ways.


To navigate the site by view mode, click on the home link  at the top left corner of the black editor bar. You will be able to navigate the website through its normal navigation menu and links. Find the page you want to update and click "edit".

You can also find the page you want to edit, by clicking "Find Content" on the gray shortcuts bar. This will reveal all the different pages on the website. Use the filter area to narrow down the number of pages that appear on the list. Default view is to show all the pages on the website.

Click Undo or Reset to go back to the main menu. Or you can refine your search even further.




CREATING A HYPERLINK

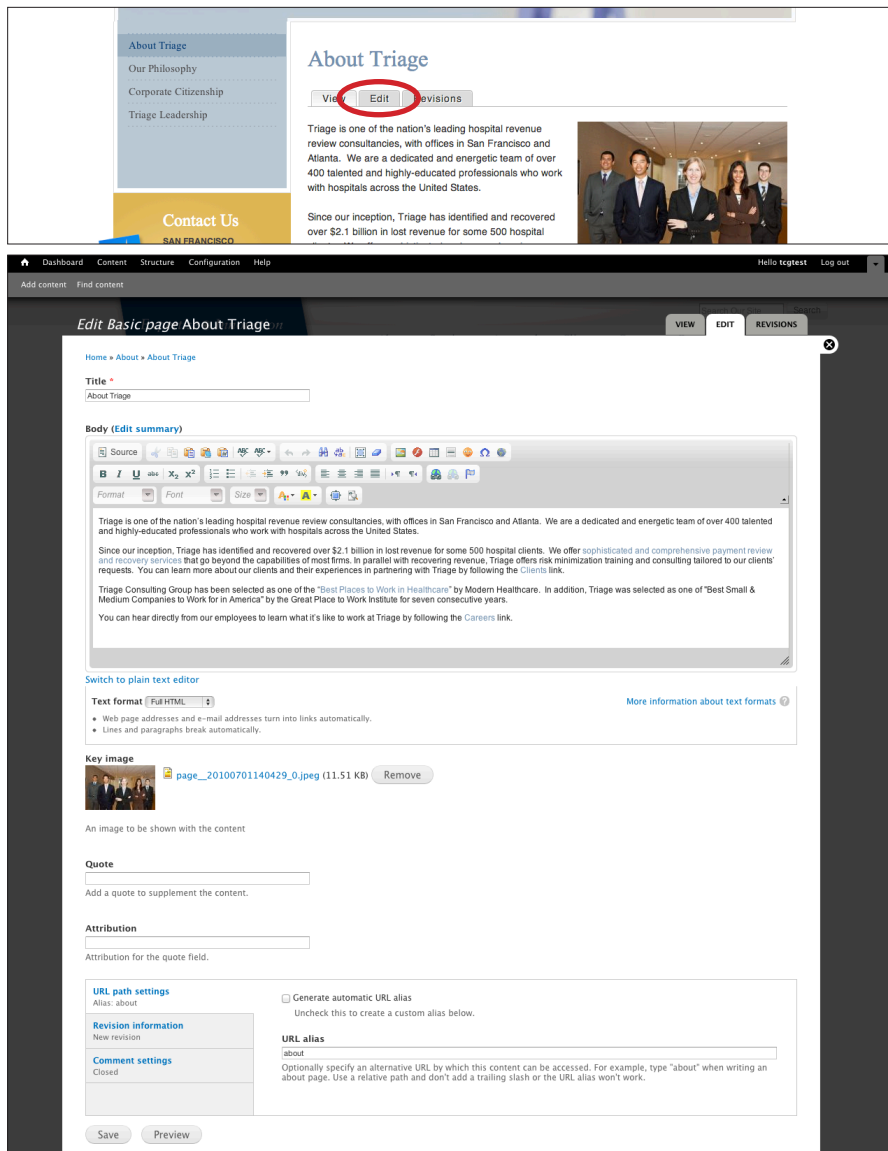
Every time you see the hyperlink icon  within the content editor window (generally when you are editing the Body section), you have the ability to add a hyperlink to your text.

1. Highlight the text you want to make a link. For example “Click here”.
2. Click on the hyperlink icon.
3. Copy and paste the URL in the “url field”.
For example “www.triageconsulting.com”

TIP: If you would like to make a link to an existing page, go first to that page on your web browser and copy the URL link. Then proceed with steps 1-3 and past the link into the URL field.

DELETING A HYPERLINK

1. Highlight the text you want to unlink.
2. Click on the delete hyperlink icon . This icon looks like the hyperlink icon with a broken chain. The icon is found just to the right of the hyperlink icon.



EDITING CONTENT (GENERAL PAGE REQUIREMENTS):

Once you've located the page you want to update, click "Edit" to begin editing.

An editing window will appear that lists you the credentials you can update. Once you changes are complete, click save.

DEFINITIONS:

Title: This is the title of the page rendered as the large blue font at the top of the page.

Body: Main text area of the page

Text format: The pages should always be modified using the "rich-text" view mode. Switching this view mode will activate the HTML and PHP editors and should be avoided by anyone without programming knowledge.

Key image: Allows you to place an image on the page.

Files must be less than 7 MB.

Allowed file types: png gif jpg jpeg.

Images must be between 50x50 and 400x400 pixels.

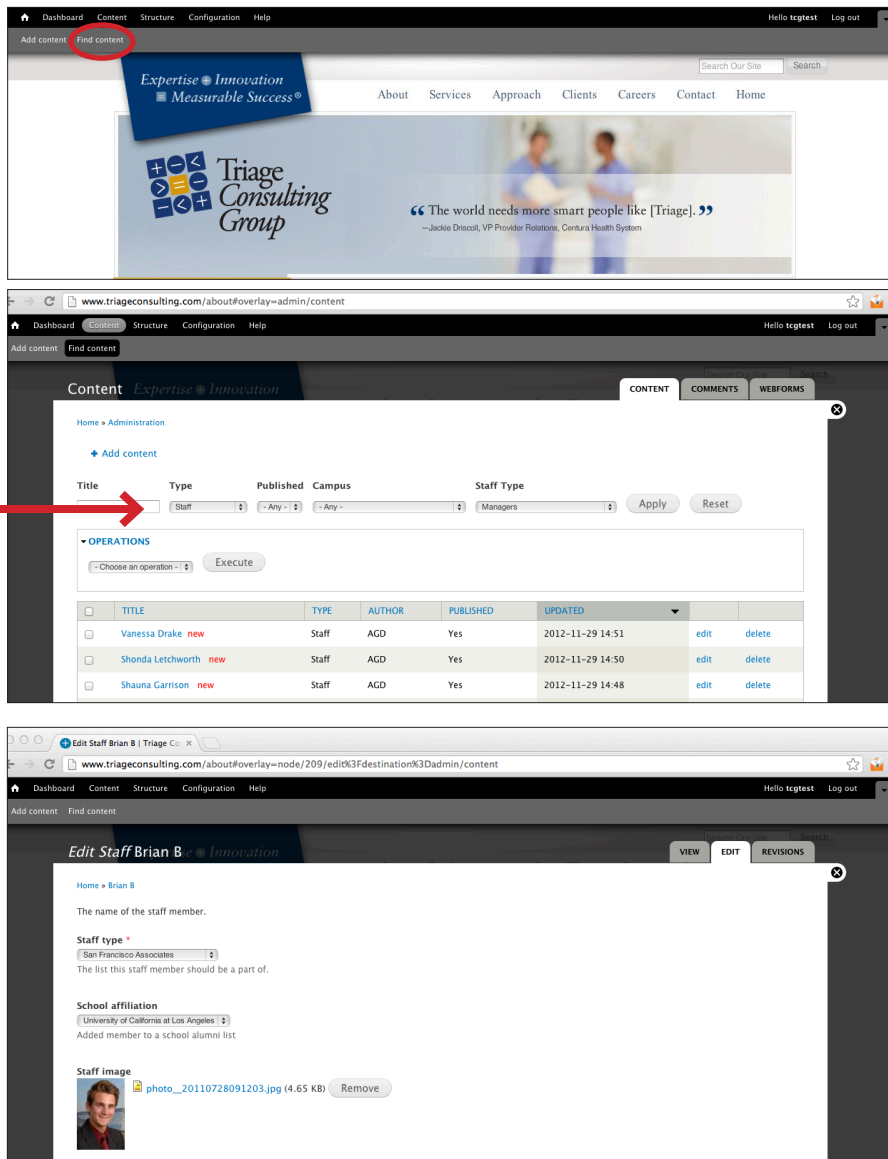
Quote: Allows you to place a testimonial or quote on the page below the photo.

Attribution: Quote author information.

Tip: If the previous 2 fields are left blank, no quote will be placed on the page.

Revision Information: Every change is logged under revision information. Its best to add a message to the log so that other editors know why a change has been made.

Editing: Staff Bios



EDITING STAFF BIOS:

1. Click on “Find Content” on the gray shortcuts bar.
2. Click “Staff” from the menu of page types you can create.
3. Click “Edit” next to the selected staff member’s name.
4. Enter the appropriate data in the fields provided and click “Save” to confirm your changes.

Staff Type: Example “San Francisco Associate”

School Affiliation: Example “University of California, Los Angeles”

Staff image: Upload a staff image

Files must be less than 8 MB.

Allowed file types: png gif jpg jpeg.

Images must be smaller than 582x700 pixels.

Name: Example: “Brian B”

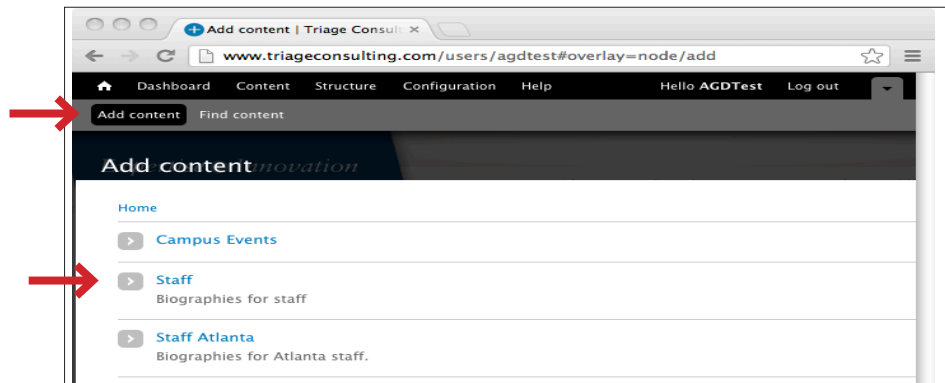
Name Suffix: Example: “CHFP”

Position: Example: “Associate”

Body: Use this area to enter a staff bio.

Tip: Color editing capabilities have been turned off to preserve up-scale the look of the page. You can add bold, italics and underlines only.

Adding: Staff Member



The screenshot shows the 'Create Staff' form in the CMS. The form is titled 'Create Staff' and includes the following fields:

- Staff type ***: A dropdown menu with the option 'Select a value'.
- School affiliation**: A dropdown menu with the option 'None'.
- Staff image**: A section with a 'Choose File' button, an 'Upload' button, and a note: 'The image for the staff member. Files must be less than 7 MB. Allowed file types: png gif jpg jpeg. Images must be larger than 100x150 pixels.'
- Name ***: A text input field.
- Name Suffix**: A text input field with a note: 'Any titles etc that will follow staff members' names'.
- Position ***: A text input field with a note: 'Position in the company, e.g., CEO, president, etc.'
- Body (Edit summary)**: A rich text editor with a toolbar and a text area.

ADDING A NEW STAFF MEMBER

If the staff member you wish to update does not already exist, you must first create the staff member.

STEP 1:

1. Click on "Add Content"
2. Click on "Staff"

NOTE: If you are adding an Atlanta staff member, please select "StaffAtlanta"

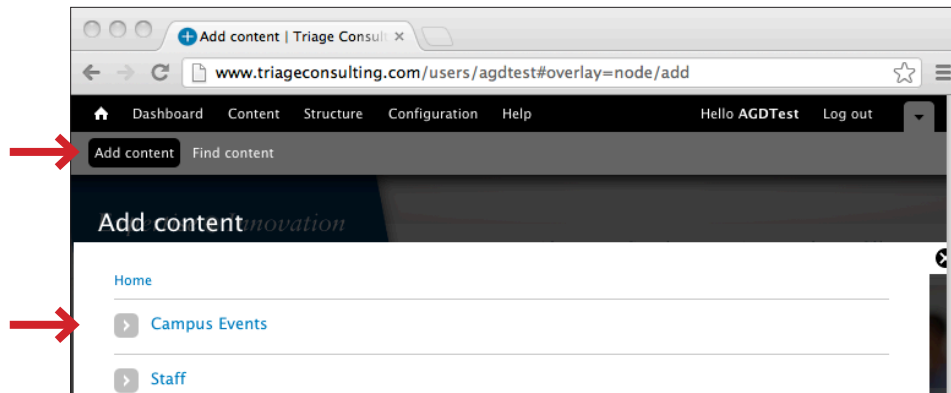
3. An editing window will appear where you can edit the appropriate data.
4. Enter all of the required fields and click save.

Required fields include:

- Staff Type
- Name
- Position
- Body

Tip: If you lack all of the required elements, the CMS will not allow you to save the new staff member. We recommend you gather all the required data first prior to beginning.

Adding: Campus Event



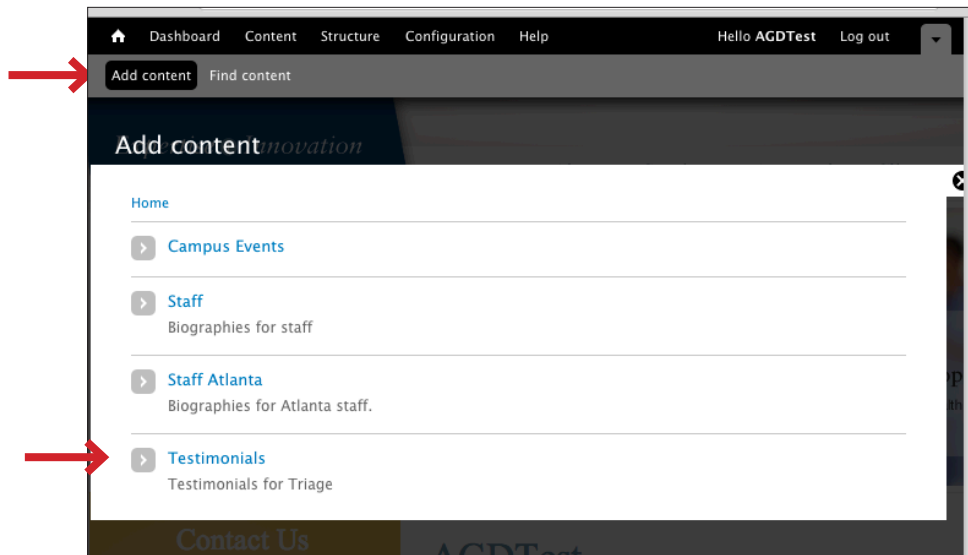
This screenshot shows the 'Create Campus Events' form. The form includes the following fields and sections:

- Campus ***: A dropdown menu with the text 'Select a value' and a description: 'The campus the event is taking place at.'
- Title ***: A text input field.
- DATE**: A section containing a 'Date' field with the value '2012-12-19' and a description: 'The date of the event'.
- Location**: A text input field with a description: 'The location on campus the event is taking place.'
- Time**: A text input field with a description: 'e.g., 10:30am - 2:30pm'.
- URL path settings**: A section with a checkbox 'Generate automatic URL alias' (checked) and a description: 'Uncheck this to create a custom alias below.'
- URL alias**: A text input field with a description: 'Optionally specify an alternative URL by which this content can be accessed. For example, type "about" when writing an about page. Use a relative path and don't add a trailing slash or the URL alias won't work.'
- Save** and **Preview** buttons at the bottom.

ADDING A CAMPUS EVENT

1. Click on "Add Content" on the gray shortcuts bar.
2. Select "Campus Events".
3. An editing window will appear where you can edit the appropriate data.
4. Enter the required data (these sections are marked with an * asterisk) and click "Save" to confirm your changes.

Adding Testimonial



The screenshot shows the 'Create Testimonials' form. The form includes the following fields and sections:

- Title ***: A text input field.
- Quote type ***: A dropdown menu with the option 'Select a value'.
- Quote ***: A text input field.
- Attribution ***: A text input field.
- Source**: A text input field with a note: 'Where the quote is from, e.g., 2011 MODERN HEALTHCARE BEST PLACES TO WORK IN HEALTHCARE'.
- Movie**: A section with a 'Choose File' button, 'No file chosen' text, and an 'Upload' button. Below this, it states: 'A video to be included with the testimonial. Generally for client testimonials. Files must be less than 7 MB. Allowed file types: swf.'
- URL path settings**: A section with 'Automatic alias' and a checkbox 'Generate automatic URL alias' (checked). Below this, it says 'Uncheck this to create a custom alias below.'
- Revision information**: A section with 'New revision' and 'Comment settings'.

ADDING A TESTIMONIAL

1. Click on "Add Content" on the gray shortcuts bar.
2. Select "Testimonials".
3. An editing window will appear where you can add the appropriate data.
4. Enter the required data (these sections are marked with an * asterisk) and click "Save" to confirm your changes.

Title: Example "Employee Testimonials"

Quote Type: Example "Employee"

Quote: Enter quote here.

Attribution: Example: "- Anonymous Triage Employee"

Source: Example: "2011 Modern Healthcare Best Places to Work in Healthcare"

Movie: This is optional and is better used for client testimonials
Files must be less than 7 MB.
Allowed file types: swf.

COPYING FROM MICROSOFT WORD

Copying and pasting directly from Microsoft Word can sometimes insert formatting errors. To minimize formatting errors, either type directly into the editing form, or copy and paste into a word editor such as Note Pad or Text Edit

REFRAIN FROM USING PUNCTUATION IN TITLES

Adding punctuation marks such as periods(.), dashes(-) or slashes(/) in names and title areas can affect the code and adversely affect the display mechanism. If a hyphen must be used, it is good practice to use an EN dash (–).

Tip: In Microsoft Word this can be done by double clicking the hyphen, followed by a space.

AGDESIGN GROUP INC.

925 Ygnacio Valley Road
Suite 103C
Walnut Creek, CA 94596
T 925.954.7084
F 925.262.1749
hello@agdesigngroup.net
www.agdesigngroup.net