

# CPUC Website Content Authoring Quick Guide

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## Content Management Server (CMS) Overview

Content Management Server or CMS is what we use to manage the Commission's websites. CMS is a server application that uses IIS and Microsoft SQL Server to publish websites.

With the upgraded version of Microsoft Content Management Server (MCMS) 2002, the websites are now database-driven or "dynamic" websites.

CMS has both a thick client and a thin client interface. These interfaces are used for two different purposes:

**Thick Client** – the thick client is used by the web administration and development team to create the website structure (site tree) and repositories for graphics and attachments. It is also used to manage the security and role assignments.

**Thin Client** – the thin client or Web Browser Client (WBC) is used by the content providers to post content to the website. This is the application you will be using in your website tasks.

### Security

Although you can access the thin client (WBC) across the network, CMS is not available for all staff to use. Staff must have been granted permissions in a particular "Role" in order to edit the site.

Once you are an approved CMS user, you will be able to access the WBC from your office PC or via VPN (as long as you are logged onto the CALPUC network).

CMS uses Windows network authentication, so you should not have to log in to access the WBC, simply use the URL that you are given and you should see the link you are given.

**\*\*Requirements:**

***You must use Internet Explorer 4.5 or higher. You cannot use any other browser (only IE).***

***Before editing a page for the first time, you will need to request that Help Desk installs ActiveX control on your PC.***

### User Roles

Staff appointed as a content author, will be assigned to specific Roles in CMS. Each user can belong to more than one role and have different permissions in different sections of a website. The following are descriptions of each of the CMS Roles and how they are used:

- **Subscribers** – subscribers are users who have been given access to CMS so that they can **view** pages published on the site. Subscribers do not have access to the authoring environment unless they are also an author, editor or moderator (see description of these roles below).
- **Authors** – authors make changes to existing pages (or create new ones) and submit them for approval by the site Moderator (the CPUC site Moderator is currently Terrie Prosper).
- **Moderators** – moderators approve or decline postings. They ensure that the schedules and content are appropriate and relevant for each posting.

- Administrators – administrators are responsible for the design and layout of the site, as well as the site architecture, structure and programming. Administrators have all rights that all other roles provide, as well as the ability to create, move, rename sections, assign and revoke user roles, etc. This role is limited to the Web Team.

## **Structure**

CMS uses the following repositories to store the different pieces that make up a webpage:

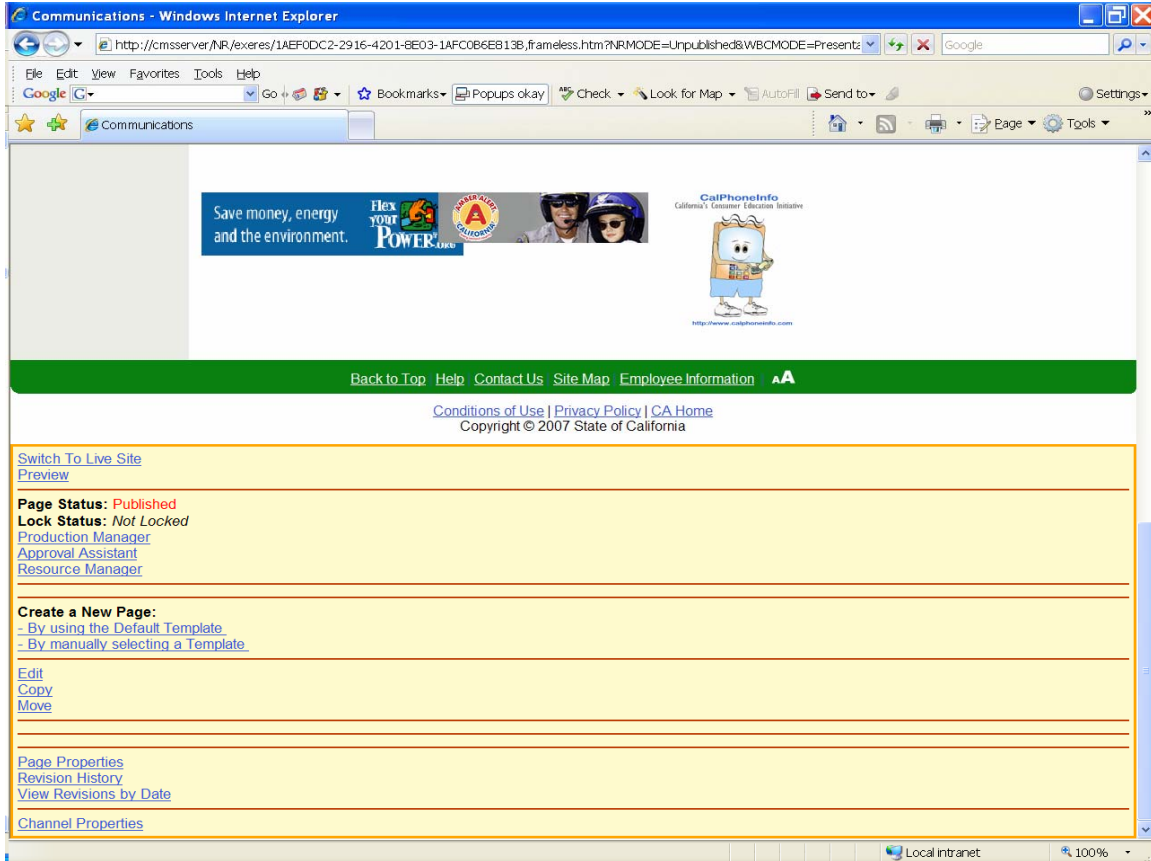
- Channels – this is where the posting lives. Once a page is created, saved and published, a posting is created and appears online.
- Resource Galleries – are used to store documents (word, excel, power point, and pdf) and graphics (.jpg, .gif, and .bmp):
  - Documents are inserted into pages as attachments and you can use a resource gallery to store attachments if they do not exceed 2 megabytes in size.
  - Graphics can either be embedded in a page (where the template placeholder allows it) or inserted as an attachment. Again, graphics should not be too large in size.
  - All attachments and graphics that will be used in a template MUST be added to a resource gallery first – you cannot upload an attachment or graphic from your computer to the page directly.
- Template Galleries –are the repositories for page templates. All of the Commission’s public websites must follow the state portal guidelines for look and feel and accessibility issues. The templates have been designed according to these guidelines.
  - Templates are made up of placeholders (this is what you will be mostly concerned with as a content provider) and background coding (HTML, java script and ASP.Net). Placeholders can be assigned to hold text or graphics or a mixture of both.
  - **Default Template:** this template is the one that is used for almost every page on the website. This template contains three placeholders that hold: a title, body or content and a “redirect” URL.

## Content Authoring using the WBC

You will be using the WBC by typing the URL for your specific website. The URL will start with: <http://cmserver/puc> plus the specific path to your division's website. You should always first navigate to the page you wish to edit OR the main page of the section where you would like to create a new page. Then, click on the "Switch to Edit Site" link located at the bottom left portion of the webpage as illustrated below:



You will then be presented with the following menu (Highlighted in Yellow):



## The Menu Selections

- Switch to Live State – as the name implies, this will switch to live state mode.
- Preview – preview how a page will look in live mode before committing to a change (saving) or approving a page.
- Page Status: **Published** or **unpublished** (this is the current status of the page)
- Lock Status: Locked or Not Locked (when a page is being edited by someone else, it will show a “Locked” status).
- Production Manager – this selection can be used to see pages which you have saved but have not yet approved for publishing.
- Approval Assistant – this option is used by Site Moderators to see postings awaiting their approval.
- Resource Manager – this selection is used to add resources to the resource galleries.
- Create a New Page – use this selection when you wish to create a brand new webpage. The following options are available:
  - By using the Default Template
  - By manually selecting a Template
- Edit – use this selection to make changes to an existing webpage.

- Copy – use this selection if you wish to copy a page. A new file name and display name should be given.
- Move – use this selection if you wish to move an existing page to another location of the website.
- Page Properties – this selection displays the following page information in the “page properties” box: Name, Display Name, URL (relative), Template Path, Description, Publishing Options (Start and Stop Publishing Dates), Owner, and Last Modified Date.
- Revision History – this selection will display a list of revisions. You can use this information to compare two revisions.
- View Revisions by Date – use this selection if you wish to see the page the way it looked just before a revision happened.
- Channel Properties – this selection is very similar to the page properties selection, except that the information is given on the channel that a particular posting lives in.

## **Creating a New Page**

First navigate to the location where your new page should go. Click the “Switch to Edit Site” link and under the “Heading Create A New Page” select either “By using the Default Template” or “By manually selecting a Template” (in most cases, the “Default Template” will be your option but you should contact the Web Team if you are not sure which one applies to your division).

A New Page will open. If you have selected the default template you will see three placeholders (information on placeholders can be entered by either typing the information of by copying & pasting the information)<sup>1</sup>:

- Title Placeholder – holds the title of the posting. You should overwrite the text that reads “Enter the title of this page here” with your own title for the page.
- Content Placeholder – holds the body of the page. You should overwrite the text that reads “Enter the page content here” with your own body content for the page.
- URL Placeholder – this placeholder should be used ONLY if you wish to have this posting redirected to another URL. In the box following the text that reads “Enter the URL you want to redirect this posting to:” you should enter the full URL to the page you wish to be redirected to (i.e. <http://www.ceert.org/>).

See illustration of placeholders below:

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<sup>1</sup> If you manually select a template, there may be more than three placeholders. Instructions are generally given so you know what goes into each template.

Default - Windows Internet Explorer

http://cmsserver/NR/exeres/CB6CE459-BFOF-4655-B9C7-23A7004BDA8C.htm?NRMODE=Unpublished&NRCHANNELGUID=%7b20CFB...

File Edit View Favorites Tools Help

Google

Go Bookmarks Popups okay Check Look for Map AutoFill Send to Settings

Normal Times New Roman 12

For Consumers Forms & Notices Proceedings Surcharges/Taxes/Fees Reports Video Franchising

PUC > Communications > Default

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Enter the title of this page here.

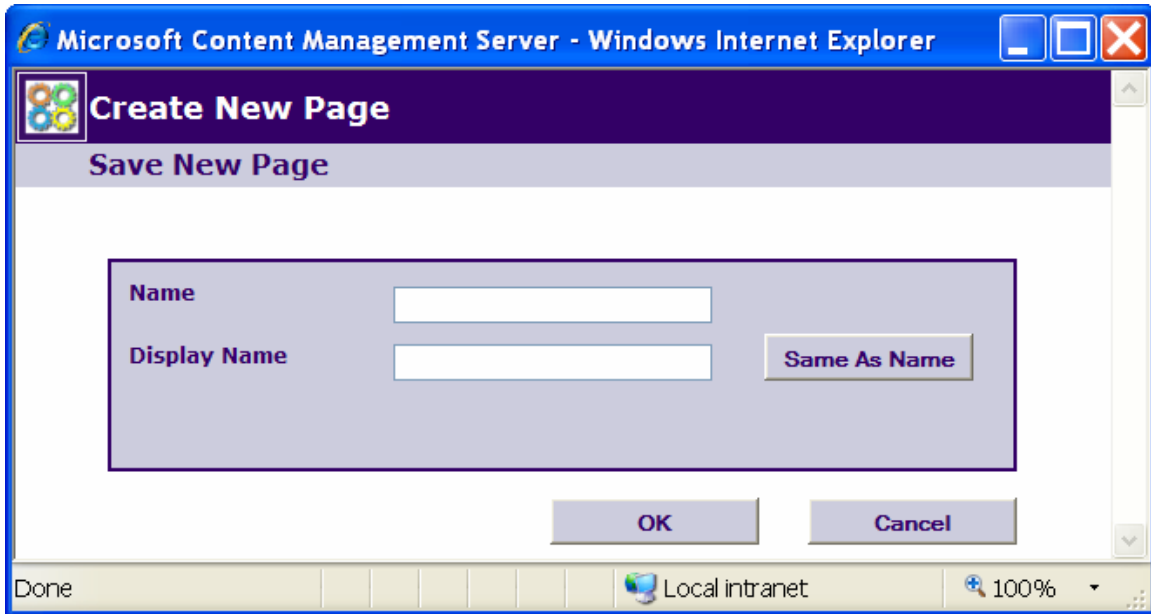
Enter the page content here:

Enter the url you want to redirect this posting to:

Done Local intranet 100%

## **Saving a New Page**

Once you have finished entering the content into the page, you can save it by selecting the “Save New Page” link on the left bottom corner of the page. The following Save New Page Screen will be presented so you can fill out the “Name” and “Display Name” as illustrated below (page name – follow conventions explained in the “Naming Conventions for Web Postings” document):



The screenshot shows a web browser window titled "Microsoft Content Management Server - Windows Internet Explorer". The main content area displays a "Create New Page" dialog box with the following elements:

- A header bar with the text "Create New Page" and "Save New Page".
- A form with two input fields: "Name" and "Display Name".
- A button labeled "Same As Name" positioned to the right of the "Display Name" field.
- Two buttons at the bottom: "OK" and "Cancel".

The browser's status bar at the bottom shows "Done", "Local intranet", and "100%" zoom level.

In order for the New Page to show on the public website, you will need to submit it for approval by clicking on the “Submit” option on the Yellow Highlighted menu. At this point, the request for approval is sent to the Website Moderator. The page will not appear on the “live site” until the Website Moderator approves your changes.

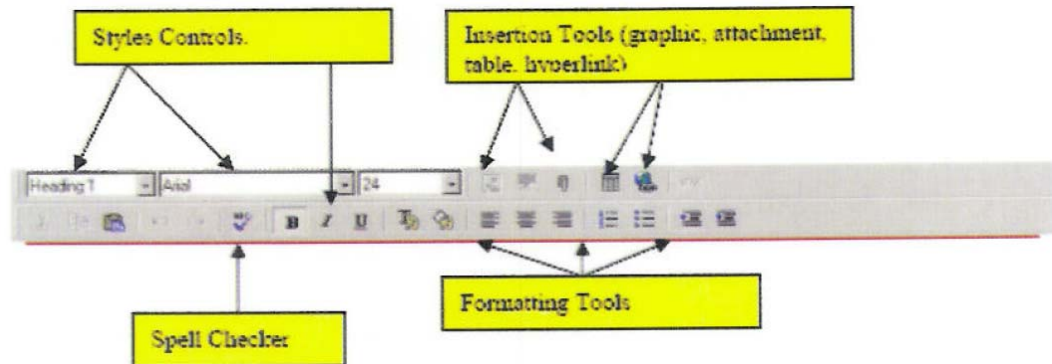
## **Editing an Existing Page**

If you wish to edit an existing page, you will first need to navigate to the page. You can then click on the “Switch to Edit Site” link and select the “Edit” option from the Yellow Highlighted menu.

Once in “Edit Mode”, you will see the placeholders filled with content. Click in the placeholder where you wish to make the changes and either begin typing or copy/paste from an existing document. After you are finished with your changes, select the “Save and Exit” option on the menu and then select “Submit”. At this point, the request for approval is sent to the Website Moderator. The page will not appear on the “live site” until the Website Moderator approves your changes.

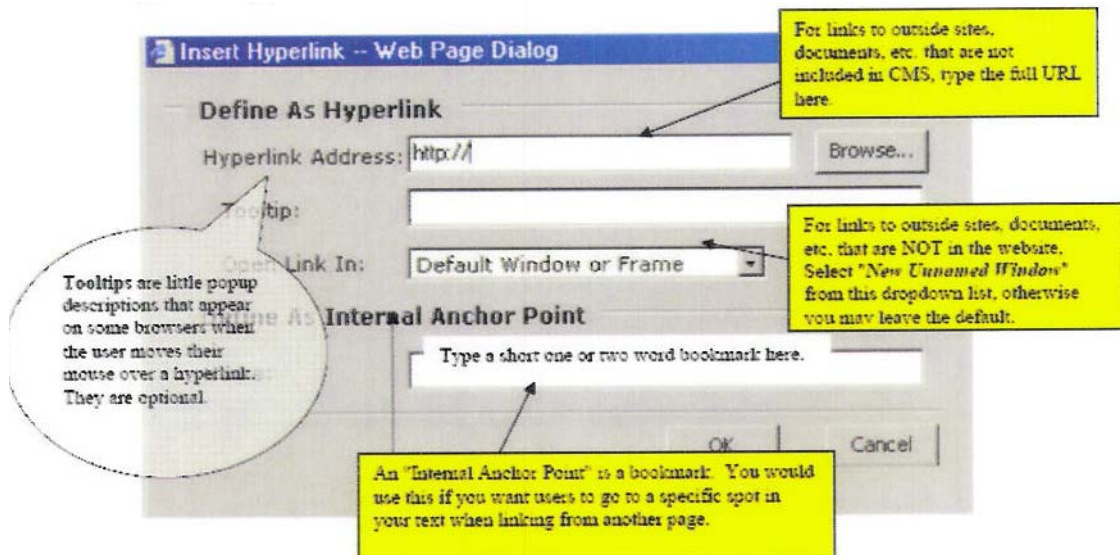


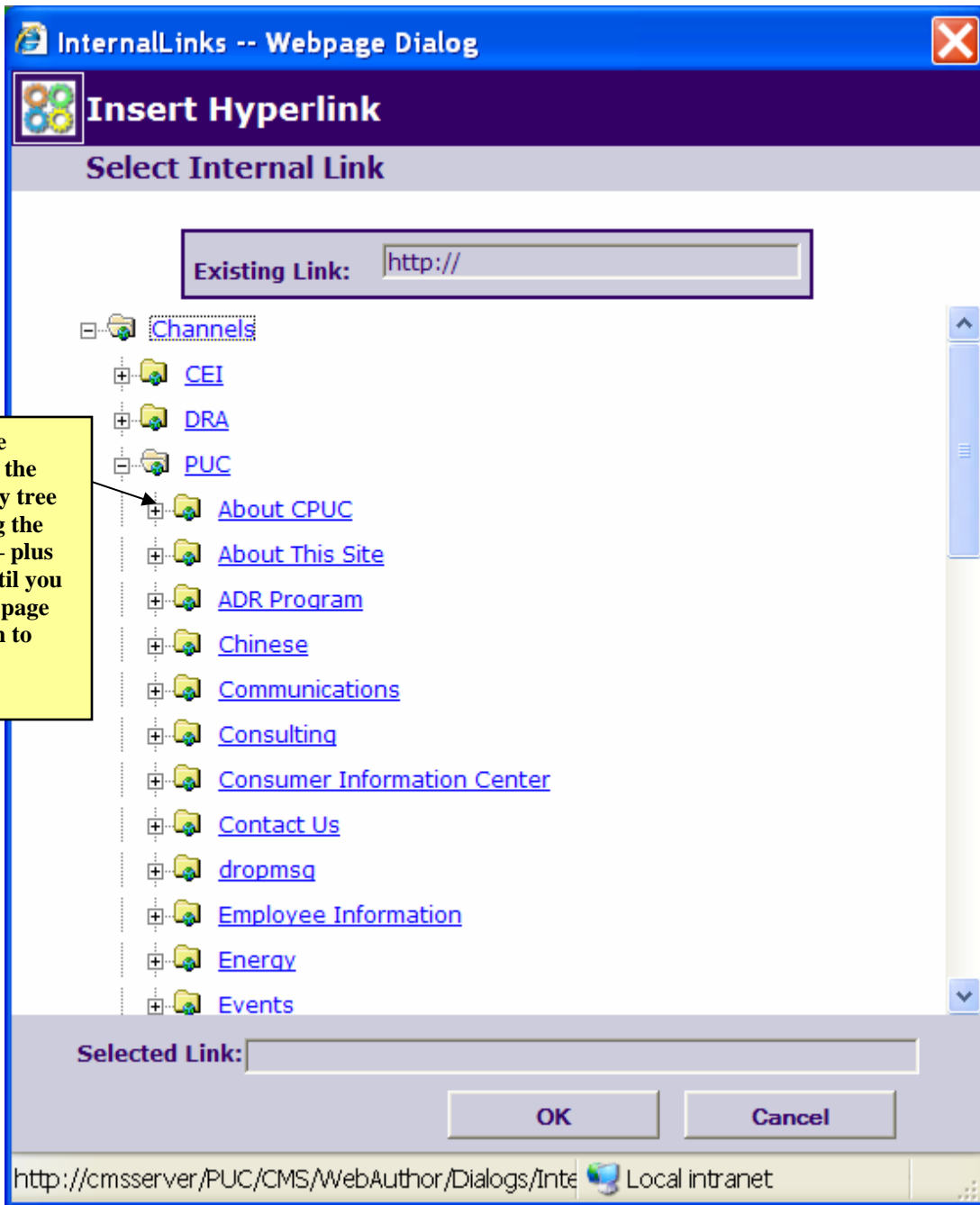
## Formatting text and Toolbar controls



## Inserting a Hyperlink on a page

First highlight the text on which you want the hyperlink to appear. Then click on the hyperlink button in the formatting toolbar (see Insertion Tools – hyperlink on the graphic above). If your hyperlink is to an outside website or to a published document on the Commission’s website, you can type or copy/paste the URL in the “Hyperlink Address” text box. However, if you are linking to a page within the Commission Website that is hosted by the Content Management System, you need to navigate to the page. By clicking on the “Browse...” button, a tree view of the website is displayed (see illustration: Internal Links – Webpage Dialog). Locate the page you wish to link to by opening up the folders for the section it resides in, then click on the page’s display name and click “OK”.





Important Rules about Internal Hyperlinks:

- **ALWAYS** use the process described above to link to an internal page.
- **NEVER** copy a link directly from the live site and paste it in. This is extremely important because:  
Links that are copied and pasted from the live site will “break” if you move a page to a different location.

When you attempt to edit a page by clicking on a link that has been copied from the live site, you will be taken to the live site and will not have access to the page.

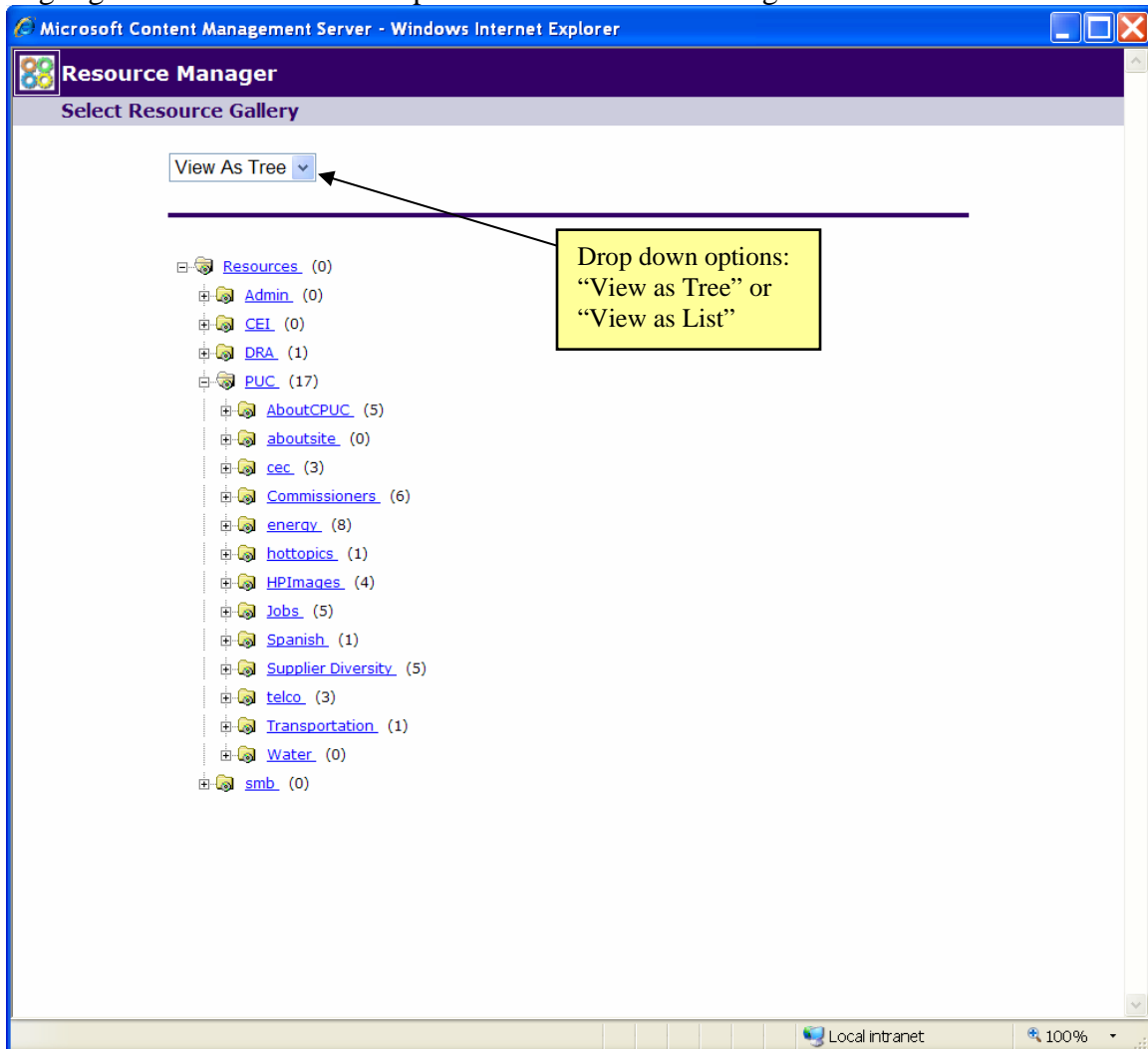
## Attachments

Items to be included as attachments must be uploaded into the Content Management System as a Resource. A Resource Gallery has been set up for this purpose (you should let the Web Team know in case you need another Resource Gallery set up for your division). Resources must meet the following criteria:

- The file must be no larger than 2 megabytes (files larger than this should be uploaded to the FTP archive instead).
- The file must be in a recognizable, widely used format (MS Word, Text, RTF, Excel, Power Point, and PDF)

## Adding Resources to the Resource Gallery

Switch to “Edit Mode” and click on the “Resource Manager” link on the Yellow Highlighted menu. You will be presented with the following screen:



From the list of Galleries presented above (this list will be different for each individual – you will only see the Galleries which you have access to for your division), select the Gallery you wish to store the item in (Note: you can change the view of the galleries form “Tree View” to “List View” and vice versa).

Once you are “in” the Gallery you wish to store your resource, click the “Add New” Button and you will be presented with the following box:

The screenshot shows a web browser window titled "Microsoft Content Management Server - Windows Internet Explorer". The main content area is a purple-themed dialog box titled "Resource Manager" with a sub-header "Add Resource".

At the top of the dialog, there is a text box labeled "Resource Gallery:" containing the path "/Resources/PUC/AboutCPUC/".

Below this is a section for "Local Resource:" with a text input field and a "Browse..." button.

Underneath is the "File Type:" section, which includes a text box with the instruction "If the file does not have a file extension, select the file type if it is in the list below. Otherwise, continue to the next step." and a dropdown menu labeled "Select File Type".

A horizontal line separates this from the "Resource Properties" section, which contains:

- A text box for "Display Name:"
- A larger text area for "Description:" with scroll arrows on the right side.

At the bottom of the dialog are two buttons: "OK" and "Cancel".

The browser's status bar at the bottom shows "Done", "Local intranet", and "100%" zoom level.

Use the “Browse” button to locate your file. Select the “file type” from the drop down box (optional), give it a “display name” (optional – the default name will be the file name, which in this case will be okay since you will give the link a display name once you attach the file on the page).

## Managing items in the Resource Gallery

Once in the Resource Manager, browse to the Gallery location you wish to manipulate. You will be presented with a screen displaying the items in that particular gallery.

To delete an item from the resource, click in the check box for the item then click the “Delete” button.

Resource	Preview	Replace	Properties	File Type	Size	Last Modified	Description
<input checked="" type="checkbox"/> angie_minkin.jpg				jpg	52k	12/28/2007 9:49:55 AM	N/A
<input type="checkbox"/> ed_quan.jpg				jpg	50k	12/28/2007 9:49:55 AM	N/A
<input type="checkbox"/> jack_leutza.jpg				jpg	50k	12/28/2007 9:49:55 AM	N/A
<input type="checkbox"/> julie_fitth.jpg				jpg	49k	12/28/2007 9:49:55 AM	N/A
<input type="checkbox"/> Paul_Clanon.jpg				jpg	51k	12/28/2007 9:49:55 AM	N/A
<input type="checkbox"/> rami_kahlon.jpg				jpg	57k	12/28/2007 9:49:55 AM	N/A

Select All Clear All

Delete Add New...

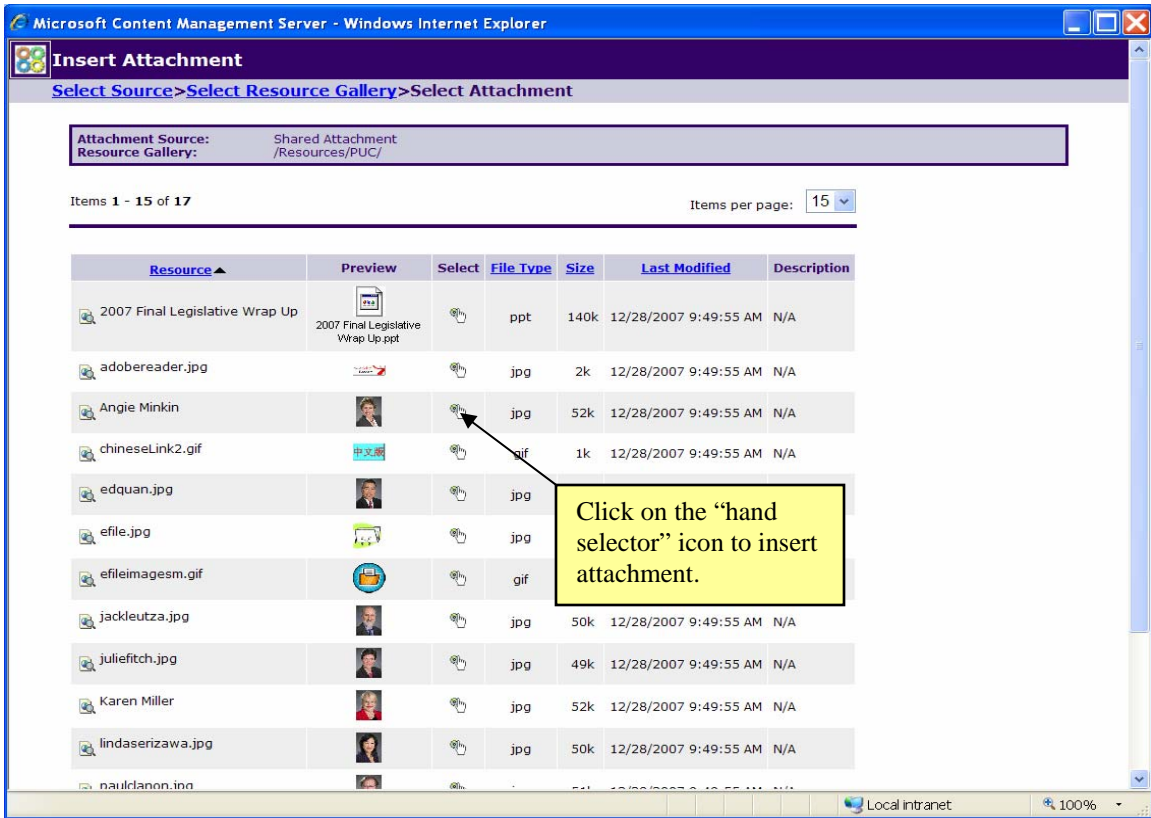
To replace an existing Resource, click the icon for the corresponding item and follow the wizard.

The properties allow you to rename the Resource, change the Display Name, and add a Description

## Adding an Attachment to a Page

In order to add an attachment to a page, the item must already be in the Resource Gallery. Follow the steps under “Adding Resources to the Resource Gallery” if the item has not yet been uploaded.

From the page into which you want to add your attachment, click on the “Insert Attachment” icon on the formatting toolbar. You will be presented with the “Insert Shared Attachment” box. Click on the “Insert Shared Attachment” link, and then browse to the Gallery that contains the resource you wish to use as an attachment. Click on the “hand selector” under the Select column in order to select the attachment (as illustrated below).



You will then be presented with the screen below. You should enter a "meaningful" Display Text, since it will be used as the text for the link on your page (default is the file name). You can then click "Insert".

