# SiteCM 3 Quick Start Guide

*Everything in Site.  Content.  eCommerce.  Customers*

Date: March 26, 2007

This guide is designed is intended for first time users of SiteCM 3.0.

In this guide we will show you how to:

1. Add a Resource

2. Add an Image

3. Add a Page

With these 3 basic processes you will be able to get content into your site.

## Content

The Content tab is by default the main landing page in SiteCM.  We land here after logging into SiteCM.



We also have access to the various sections of the site content for this quick start guide we are interested in the following:

- Pages – has all of the pages of the site available where we can view page properties and can edit any pages we have access to.

- Images – is the SiteCM Image Gallery. Where we can add, edit and delete any Gif or Jpg images that may be on the site.

- Resources – is the SiteCM Resources Gallery. Here we can add, edit and delete any Resource that you wish to have available in the site.

The Resource Gallery holds any resources that you will be using in your site. It acts as a repository for all resources – except Jpeg and Gif images. Resources may be added as links within your pages at anytime. The Resource Gallery accepts a multiple of file types that are used in any office environments. We have attempted to allow a large number of file types, but in the event a file type you wish to upload is not accepted, contact an ideaLEVER representative or your reseller to see if it is possible to allow it.

The Resource Gallery like the other sections of the SiteCM manager is divided into 2 parts - the Main Pane and the Secondary Pane.
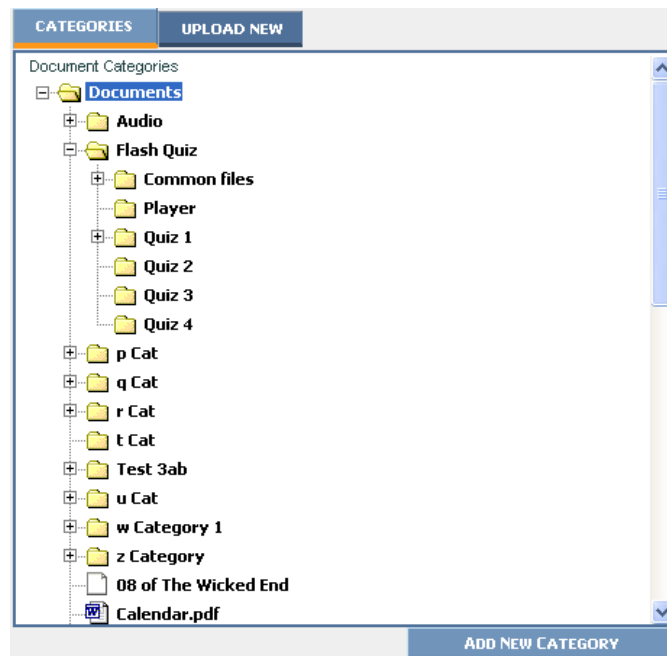


Main Pane

The Main pane of the Resource Gallery contains 2 tabs:

- Categories – to find resources based on the Categories they are in.

- Upload New – where Users upload resources into SiteCM.

Secondary Pane

The Secondary pane of the Resource Gallery does double duty, depending on what is selected in the Main pane.



If a Category is selected in the Categories tab, the secondary pane shows:

- Category properties -- used to see and edit basic Category properties.

- Permissions for that Category -- where you can set the permissions on the Category
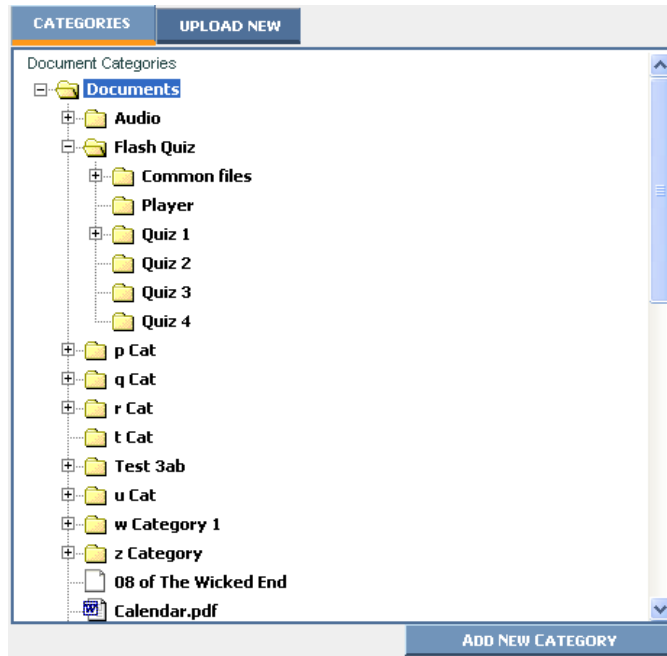


If a Resource is selected in the Categories tab, the secondary pane will display:

- Edit – where it is possible to see and edit basic properties of the selected resource

- Permissions – where you can set the permissions of the resource.

Resource Categories

The Categories tab shows all of the Categories within the Resource Gallery.



Initially the Resources Category is visible. To see all of the categories click on the + symbol next to the category. Categories may all be in the root of the Resources category or they may be located within other categories. To see the sub categories and resources within a given category, click on the + symbol next to the category or double-click on the Category Name.  There is no limit to the number of categories within the Resource gallery or the number of resources that can be within the Resource Gallery or any category.

Add a Resource Category

To add a category you must right click on any category within the Categories tab or click on the Add New Category button located at the bottom of the categories tab.

This will bring up the Category tab in the Secondary Pane.

By default the Category ID will be set to –1, this will change once the category is saved. Fill in the Name, Description and Parent Category. Clicking on Save will create the Category in the Resources Category list.

It is possible to create categories within categories. To create a sub-category, right click on the main or parent category and click on the Add New Category option to bring up the Add New category options. You will see the Parent Category already set. You will need to enter the Name and Description of the new Category.

Clicking on the Add New Category button will also bring up the Add New Category options, but unlike the right click option, the Parent Category will not be set.

Once a sub category has been created it is possible to move it into or out of another category by clicking and dragging it to the new category you want it to appear under.

Edit a Resource Category

Te edit a Category, either click on the Category name or right-click on the Category name and select Edit. Either of these two options will bring up the resource Category pane with the Category tab selected and the properties filled in. The Name, Description and parent Category are all editable.



Once edited, simply click the Save button to save the edits to the category or Cancel to revert back to the original.

## Category Properties

Clicking on a Category will bring up the Categories Secondary pane, which will show the Category properties and the Permissions tabs.



## Category Tab

The category tab shows the properties of the category:

**CategoryID** – is the ID number of the category within SiteCM

**Name** – is the name of the Category as it is shown in the categories list within the Categories tab and also in the list when adding a resource to a page.

**Description** – is an area to give the Category a description. This description helps to better define what the Category is used for.

**Parent Category** – is the category that this category is a sub category of.

**Date Added** – is when the category was added to the system

It is possible to edit the Name, Description and Parent Category. Once the edits are complete, clicking on Update will save the changes and they will then be reflected in the Categories List. Cancel will undo any changes you have made and do not want to save. Delete will delete the currently selected Category, unless there are sub categories or resources within the Category. Those will have to be moved or deleted in order to delete the category.

### Add New Resource

The Upload New tab is where resources are added to the Resource Gallery. You arrive at this tab in one of 2 ways:

1. Clicking on the Upload New tab.

2. Right Clicking on a Resource Category and selecting Add Resource to Category.

In the Upload New tab, we have the option to upload a single resource or multiple resources. The resources will be uploaded to the category selected at the top of the tab. Once uploaded, it is a simple matter of going into that category and editing the resources to set their name and Alternate text and if necessary move them to another category.



**NOTE**: If a resource type is not allowed, the Resource Gallery will inform the Content Owner after it has attempted to upload the resource.

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## Single Resource Upload

To upload a single resource use the tab as it is, Select the Category you wish to add the resource to and then click on the "Browse…" button to browse to the location of the resource on your computer. Clicking on the Add button will not add the resource to the gallery. It is only used if you will be uploading more than one resource at a time. Add will add more file upload options to the tab. If there are more Browse buttons than needed, clicking on the corresponding "Remove" button will remove that Browse option. Clicking on "Upload Files" will upload the resource to the Category selected.

## Multiple Resource Upload

To upload multiple resources, Click on the Add button to add more resource browse options, and browse to each individual resource. If there are too many resource upload boxes, click on the corresponding "Remove" button until the unneeded boxes have been removed.

Once you have the correct number of resource boxes and resources set, click on the Upload Files button to upload the resources to the Resource Gallery. While they are uploading you will see a progress bar to allow you to monitor the progress of the resource uploads.

When completed, the system defaults back to the Categories tab with the Category the resources were uploaded to expanded.

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With SiteCM 3.0, it is possible to add almost any type of resource commonly used in business today. The most common types are:

Word, Excel and Acrobat PDF resources. The Resource gallery is capable of handling a number of file types but should a resource not be allowed into your Gallery, contact an ideaLEVER representative or your reseller to add that type to your site.

Once the resource(s) is uploaded, you can then edit the properties of the resource. We will look at how to edit those Properties when we get to the Edit tab in the Secondary Pane.

Changing the Category of a Resource

There are 2 ways to change the category that a resource is in.

The first and most obvious is within the Edit tab in the Secondary pane, by selecting a different category from the Categories list and saving the change. It is possible to select more than one category for the resource to be in. We will cover this in detail in the Edit tab of the Secondary pane
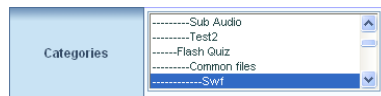


The second way to change the category that a resource is in is by dragging and dropping the resource from one category to another. Simply click on the resource in the Main Categories tab and while holding down the mouse button drag the resource to the new category you wish it to be a part of. There is no need to save the change. Once a resource is moved to a new category the change is final, unless the resource is moved back.

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## Secondary Pane

When a resource is selected in the Main Pane, the resource properties are displayed in the secondary pane in the following tabs:

- Edit – where we can edit the basic properties of the resource.

- Permissions – we can edit the access permissions to the image

### Resource Edit

The Resource Edit tab gives users access to review and if necessary edit the main properties of a resource.

The properties of the resource are as follows:

1. Resource ID

   | Document ID | 106 |
   |---|---|

   This is the number of the resource as it is recorded within the Image Gallery.

2. Resource Name

   | Document Name | ast_alert.swf |
   |---|---|

   The resource name is the name that shows in the Categories list.

3. Categories

   | Categories | ----------Sub Audio<br>----------Test2<br>------Flash Quiz<br>----------Common files<br>------------Swf |
   |---|---|

   This box shows what categories the resource is a part of. It is possible to have a resource located in more than one category. Ctrl + Clicking allows you to select more that one category. It can also be used to remove the resource from a category. But a resource must be in at least one category.

4. URL

   | URL | /docs/swf/ast_alert | .swf |
   |---|---|---|

   This is the location of the resource within the site. This is the actual resource filename within the Resource Gallery. It is possible to change the resource filename, but the only way to change the file extension is to upload a resource with that extension.

5. Title

   | Title | ast_alert.swf |
   |---|---|

   The text that is shown when resources are placed within a page. This text may also be read to site visitors if they are vision impaired.

6. Keywords

   | Keywords | |
   |---|---|

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The keywords are used in the SiteCM site search. The search allows for the searching of pages as well as Resources and Images. When searching images the Search makes use of these keywords. If you do not want an image to be searchable leave the keywords blank.

7. File Size

| File Size | 44.92 Kb |
|-----------|----------|

Shows the actual size of the resource. This is not editable.

8. Descriptions
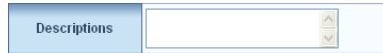
| Descriptions | |
|--------------|---|

This area is used for a description of the resource. This description can show on the site, so the description should make sense to the Content Owners as well as to site visitors.

9. Download

| Download | Click Here |
|----------|------------|

Using the "Click Here" link, it is possible to open the resource on your computer or to save a copy on your computer. If you do any editing and save the resource, it will be necessary to use the next option to upload the edited resource to replace the existing.
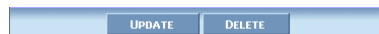
10. Upload New

| Upload New | Upload Replacement Document |
|------------|-----------------------------|

Using the "Upload Replacement Resource" link it is possible to upload a new or edited resource to take the place of the existing resource. This is very useful especially if have multiple links in your site that linked to the original resource. Uploading the replacement saves the resource in the same place as the current resource.

If any changes are made to any of the properties within the Edit tab, clicking on Save will save those changes.
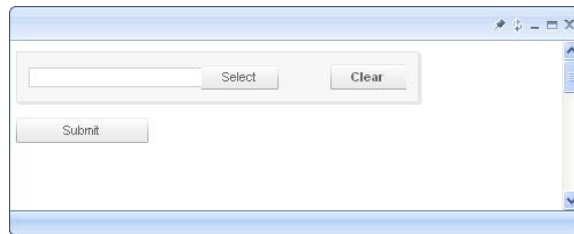
If you want to delete the currently selected resource, clicking on Delete will delete the resource if it is not on a page within the site. If it is, the system will tell you what page and you will be required to remove it from that page before being allowed to delete it.

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## Images

The Image Gallery holds any images that you will be using in your site. It acts as a repository for all images. They may be added to pages at anytime. The Image Gallery only accepts jpg's, gif's and png image types. You are not allowed to add other image types to the Gallery.

With SiteCM 3.0, content editors no longer have to worry about editing their images in an outside image editor before adding them to the Gallery. An image uploaded into the image gallery can now be resized in whatever page or pages it is located in. A version of the image is saved at that size when the page is saved.

The Image Gallery like the other sections of the SiteCM manager is divided into 2 parts; the Main Pane and the Secondary Pane.
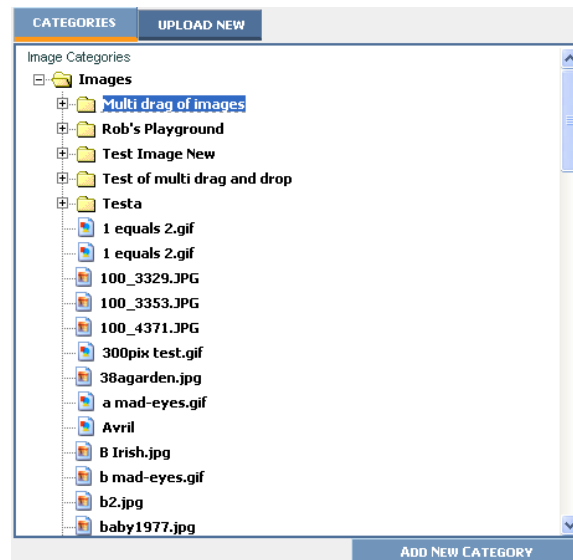


Main Pane

The Main pane of the Image Gallery contains 2 tabs:

- Categories – to find images based on the Categories they are in.

- Upload New – where Users upload images into SiteCM.

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Secondary Pane

The Secondary pane of the Image Gallery does double duty, depending on what is selected in the Main pane.



If a Category is selected in the Categories tab, the secondary pane shows:

- Category properties

- Permissions for that Category



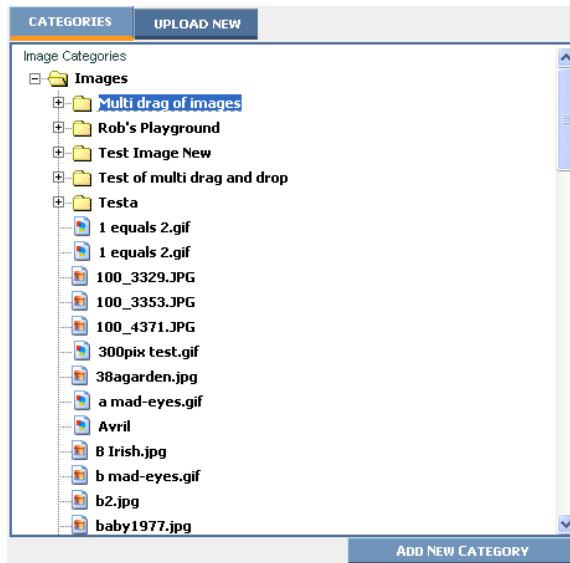If an Image is selected in the Categories tab, the secondary pane will display:

- Edit – where it is possible to see and edit basic properties

- Permissions – where you can set the permissions of the image

- Preview – where you can see a preview of the selected image

## Image Categories

The Categories tab shows all of the Categories within the Image Gallery.



Initially the Images Category is expanded with all main-sub categories shown as well as any images that are located within the Images category. To see inside a category click on the + symbol next to the category or double click on the category name. Categories may be in the root of the Images category or they may be located within other categories. There is no limit to the number of categories within the Image gallery or the number of images that can be within any category.

Add an Image Category

To Add a category you must right click on any category within the Categories tab and select "Add a New Category" or click on the Add New Category button located at the bottom of the categories tab.

His will bring up the Category tab in the Secondary Pane.



By default the Category ID will be set to –1, this will change once the category is saved. Fill in the Name, Description and Parent Category. Clicking on Update will create the Category in the Images Category list.

It is possible to create categories within categories. To create a sub-category, right click on the main or parent category and click on the Add New Category option to bring up the Add New Category option. You will see the Parent Category already set. You will need to enter the Name and Description of your new Category.

Clicking on the Add New Category button will also bring up the Add New Category options, but unlike the right click option, the Parent Category will not be set.

Once a sub category has been created it is possible to move it into or outof another category by clicking and dragging it to the new category you want it to appear under.

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Edit an Image Category

Te edit a Category, either click on the Category name or right-click on the Category name and select Edit. Either of these two options will bring up the Image Category pane with the Category tab selected and the properties filled in. The Name, Description and parent Category are all editable.



Once edited, simply click the Update button to save the edits to the category, or Cancel to revert back to the original

## Category Properties

Clicking on a Category will bring up the Categories Secondary pane, which will show the Category properties and the Permissions tabs.



## Category Tab

The category tab shows the properties of the category selected:

**CategoryID** – is the ID number of the category within SiteCM

**Name** – is the name of the Category as it is shown in the categories list within the Categories tab and also in the list when adding an image to a page.

**Description** – is an area to give the Category a description. This description helps to better define what the Category is used for.

**Parent Category** – is the category that this category is a sub category of.

**Date Added** – is when the category was added to the system

It is possible to edit the Name, Description and Parent Category. Once the edits are complete, clicking on Update will save the changes and they will then be reflected in the Categories List. Cancel will undo any changes you have made and do not want to save. Delete will delete the currently selected Category, unless there are sub categories or images within the Category. Those will have to be moved or deleted in order to delete the category.

### Add a New Image

The Upload New tab is where images are added to the Image Gallery. You arrive at this tab in one of 2 ways:

1. Clicking on the **Upload New** tab.

2. Right clicking on an Image Category and selecting **Add Image to Category**.

In the Upload New tab, we have the option to upload a single image or multiple images. The images will be uploaded to the category selected at the top of the tab. Once uploaded, it is a simple matter of going into that category and editing the images to set their name and Alternate text and if necessary move them to another category.



**NOTE**: Gifs and Jpg images are the only image types allowed within the SiteCM Image Gallery. Any other image types cannot be uploaded to the gallery.

## Single Image Upload

To upload a single image use the tab as it is, Select the Category you wish to add images to and then click on the "Browse…" button to browse to the location of the image on your computer. There is no need to click on the Add button this is only used if you will be uploading more than one image at a time. If there are more Browse buttons than needed, clicking on the corresponding "Remove" button will remove that Browse option. Clicking on "Upload Files" will upload the image to the Category selected.

## Multiple Image Upload

To upload multiple images, Click on the add button to add more image browse options, and browse to each individual image. If there are too many image upload boxes, click on the corresponding "Remove" button until the unneeded boxes have been removed.

Once you have the correct number of images boxes and images set, click on the Upload Files button to upload the images to the Image Gallery. While they are uploading you will see a progress bar to allow you to monitor the progress of the image uploads.

When completed, the system defaults back to the Categories tab with the Category the images were uploaded to expanded.

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Once the image(s) is uploaded, you can then edit the properties of the image. We will look at how to edit those Properties when we get to the Edit tab in the Secondary Pane.

Changing the Category of an Image

There are 2 ways to change the category that an image is in.

The first and most obvious is within the Edit tab in the Secondary pane, by selecting a different category from the Categories list and saving the change. It is possible to select more than one category for the image to be in. We will cover this in detail in the Edit tab of the Secondary pane
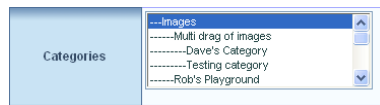


The second way to change the category that an image is in is by dragging and dropping an image from one category to another. Simply click on the image in the Main Categories tab and while holding down the mouse button drag the image to the new category you wish it to be a part of. There is no need to save the change. Once an image is moved to a new category the change is final, unless the image is moved back.

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## Secondary Pane

When an image is selected in the Main Pane, the image information is displayed in the secondary pane in the following tabs:

- Edit – where we can edit the basic properties of the image.

- Preview – here we can see a preview of the selected image.

### Image Edit

The image Edit tab is where we can access the

The Properties of the image are as follows.

1. Image ID

   | Image ID | 162 |
   |---|---|

   This is the number of the image as it is recorded within the Image Gallery.

2. Image Name

   | Image Name | Test image 960p.jpg |
   |---|---|

   This is the name as it shows in the Categories list. It is also the name displayed when adding an image to a page or creating a link to an image within the SiteCM content editor.

3. Categories

   | Categories | ---Images<br>------Multi drag of images<br>---------Dave's Category<br>---------Testing category<br>------Rob's Playground |
   |---|---|

   What categories the image is a member of. It is possible to have an image located in more than one category. Ctrl + Clicking allows you to select more that one category. Ctrl+ Clicking can also be used to remove the image from a category. But remember that an image must be in at least one category.

4. URL

   | URL | /SiteCM/ | blue hills | .jpg |
   |---|---|---|---|

    Actual URL of the image within the site. This is the actual image filename within the Image Gallery. It is possible to change the image filename, but the only way to change the file extension is upload an image with that extension.

5. Alt Text

   | Alt Text | Test image 960p.jpg |
   |---|---|

    The text that is shown when the cursor is held over the image. This text is also read to site visitors if they are vision impaired.

6. Keywords

Keywords

The keywords are used in the SiteCM site search. The search allows for the searching of pages as well as Documents and Images. When searching images the Search makes use of these keywords. If you do not want an image to be searchable leave the keywords blank.

7. File Size

File Size   84.95 Kb

File size of the image.

8. Height/Width

Height/Width   720/ 960 pixels

The Height and Width of the image in pixels

9. Download

Download   Click Here

Using the "Click Here" link, it is possible to open the image in the main image editing program on your computer or to save a copy of the image on your computer. If you do any editing of the image and then save it, you may need to use the next option to upload the edited image to replace the existing one in the Image gallery.

10. Upload New

Upload New   Upload Replacement Image

Using the "Upload Replacement Image" it is possible to upload an image to take the place of the existing image. Uploading a replacement image will replace all versions of the current image used within the site. Even if the replacement image has a different file name, all existing images will be replaced.
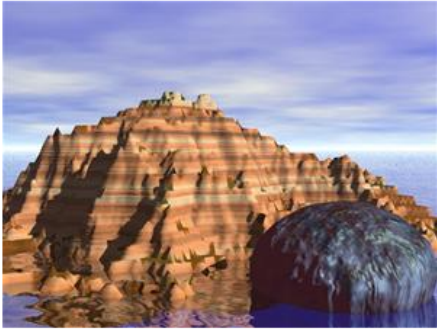
If any changes are made to any of the properties within the Edit tab, clicking on Update will save those changes.

UPDATE   DELETE

If you want to delete the image clicking on Delete will delete the image if it is not on a page within the site. If it is, the system will tell you what page and you will be required to remove it from that page before being allowed to delete it.

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### Preview

Here you can preview the currently selected image. It may be resized to fit within the preview area, if it is necessary to see the full size image, click on the View Full Image link.



If you are looking for an image, but cannot remember it's name, click on the preview tab and then work your way through the list of images to find the image. The preview tab will remain selected when you change images.

At the bottom of the Main Pane of the pages section, is the button for adding a New Page.

**ADD NEW PAGE**

Clicking on this button will bring up a page where you can select the type of new page you wish to create.

### Types of Pages

The page options include:

- Plain HTML – this is a standard web page. And the one you will use 90% of the time.

- Link To – Link to pages are ways to get external content into your site as well as have content from your site in multiple locations .

- Feedback Form – is an application that allows you to create questions that will then be filled out by a site visitor. The information collected would then be emailed to an email address of your choosing.

After selecting the Page type, you will then see a blank page of that type open up in the SiteCM editor. Content will need to be added and all Metadata, Properties and Navigation will need to be entered before the page may be saved.

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## Plain HTML

The Plain HTML page is the foundation for all SiteCM pages and is the only page type we will deal with in this guide. This type of page contains all of the elements that can be found in any other page type. These elements are:

- Content

- Meta Data

- Properties

- Navigation

- Save



To move through these tabs simply click on the appropriate tab or you may also use the **<--Previous | Next -->** links in the lower right hand corner of the window.

### Content

The majority of your site pages will be HTML pages with most of your time editing the site spent within the Content tab. This Tab contains the SiteCM HTML editor. Functioning much like Word, it makes editing your content easy without requiring any HTML programming knowledge. Users familiar with SiteCM 2.5, will notice a marked difference to the Editor.



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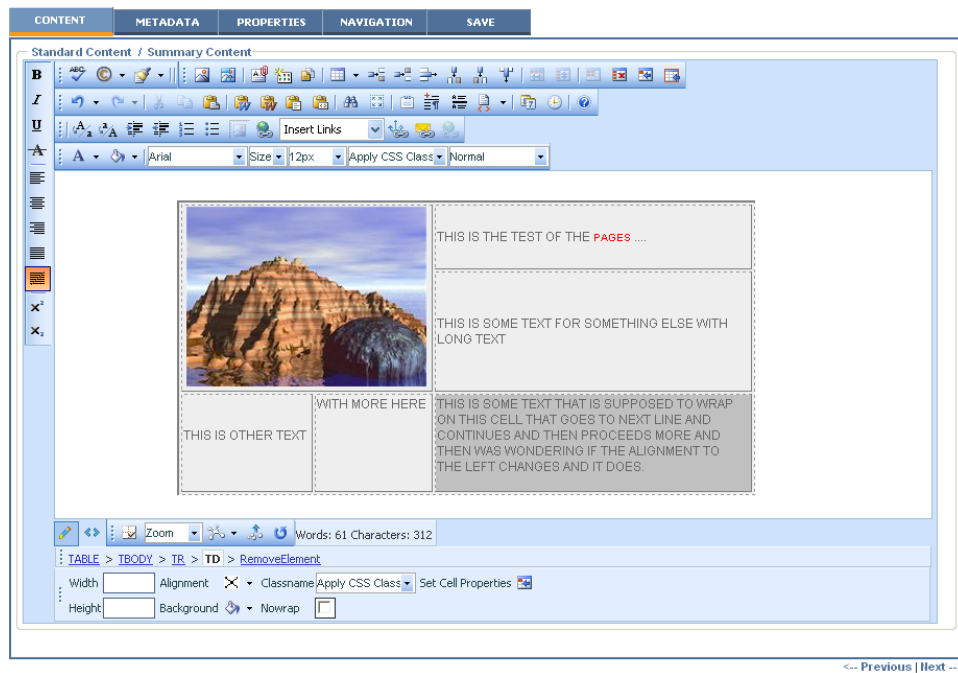
## Meta Data

 The Meta Data tab is where you can add Meta tags that are used by Search Engines to help index your site within the engines. The Meta Data carries about 30% of the weighting in the Engines.



**Browser Title** – is the Title of the page as it shows at very top of the Browser window. This Title may only have letters and numbers with spaces. The browser title may be 100 characters in length. The Browser Title is the only option that you must complete in the Metadata tab.

**Note**: if a page does not have any Keywords or Description, SiteCM will use the Global Keywords and Description that is set in the Admin section of the site. If your site licence is a Micro, you will not have access to this. You will need to have the default Keywords and Description set up either an ideaLEVER representative or your reseller.

## Properties

The Properties tab is where we set the page filename as well as when and how we want the page to be visible on the site.



These Properties here are:

- Current version

- Page filename

- Date Added

- Activation Date

- De-Activation Date

- Suspend Page

- Show in Site Map

- Show in Search

### Current Version

This is the Current version of the page shown similar to 15.41. The 15 represents the number of the version as it is shown in the page History, or the number of times the page has been Saved & Launched. The 41 is the number of times the page has been Saved.

### Page Filename

This is where set the filename. The format of the filename must be as it is in the example to the right "/myfile.htm" there must be a forward slash "/" followed by the name of the file with the extension ".htm"

If you wish to have your pages located in directories, you must enter the directory name here. If we would like to have page abc.htm to show in folder "MyFolder" the page

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filename must be as follows "/MyFolder/abc.htm". This page in Folder view would then show under the Folder "MyFolder".

The page filename in combination with your domain name is what is given to people as a link to the page or if you are referring to the page address.
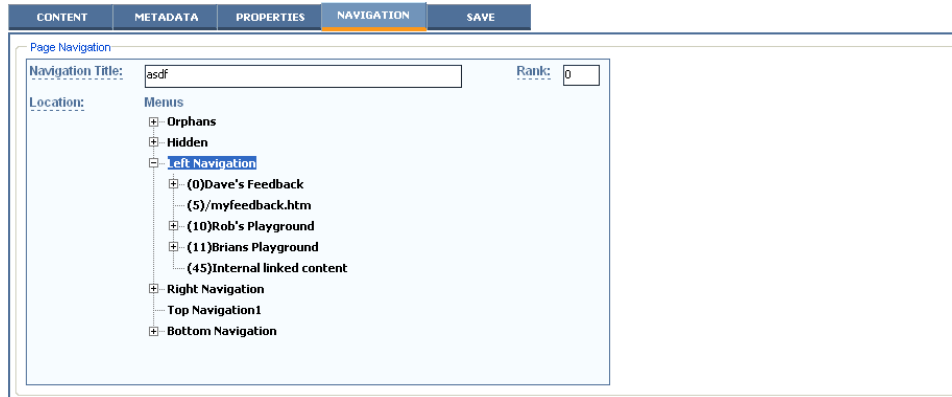
IE: [www.mysite.com/MyFolder/abc.htm](www.mysite.com/MyFolder/abc.htm)

This is also the name you see when you look in Folders tab of the Pages main pane.

You can leave all of the rest of the property options at their defaults.

## Navigation

The Navigation tab is where we can place and name the page within the site Navigation.



## Navigation Title

This is the name of the page as it appears in the associated navigation on the site. It is also the name used to refer to the page in the Navigation, Status and Search tabs of the Pages Main pane.

## Rank

This ranking number is used to set where the page is displayed relative to any other pages at the same level. If ranking numbers are the same, SiteCM will display the pages with same ranking number in alphabetical order.

## Location

Here we select where within the site structure we want this page. If we want the page to be at the main level of the site, we select the main navigation structure. In this case we have chosen the Left Navigation. If we want the page to be a sub page or child of another page, we select that page as its parent.

To see all of the pages and options available in the site, click on the + to expand the navigation structures.

## Save

Clicking on the Save tab will start the Save Process. After clicking on Save, you will be able to see the page content within the context of the site. This is a preview for you to make sure there are no surprises with the page layout. If necessary there is also the "Preview Changes in a full screen" link at the bottom of the Save tab. This link will open the page in a full screen so you can see all of the content in context.
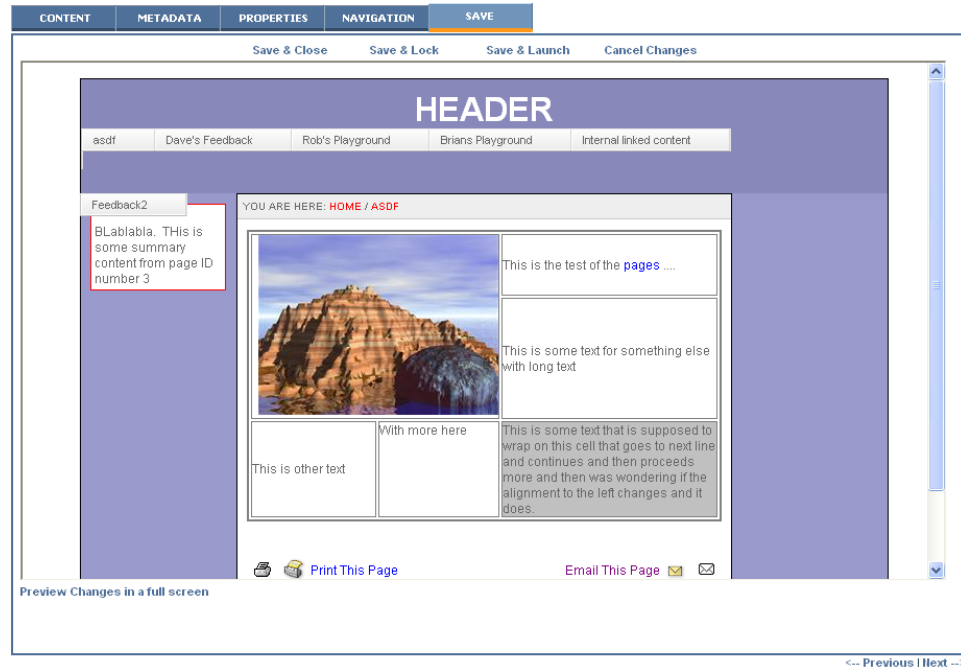


If there are any problems, go to the Content tab to edit the content to correct the problems. If there are any errors you will be taken to the appropriate tab to correct them.

Once you are happy with what the preview shows and there are no errors, you have 4 options to deal with your content:

1. Save & Close

2. Save & Lock

3. Save & Launch

4. Cancel Changes

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Save & Close

With the Save & Close option, you can save your content but it will not be launched for people to see on the site.

This option is convenient when you are developing your content and want to save the content so you can continue working on it at a later time.

Save & Lock

The Save & Lock option is the same as the Save & Close option, you can save your content and it will not be launched for people to see on the site. The exception is that it will be locked so that only you can continue editing the content later. It will remain locked until you open the page, and either Save & Close or Save & Launch the page.

Save & Launch

The Save & Launch option is the most often used option. With it, your page will be saved and it will be launched for people to see on the site.

Cancel Changes

The Cancel Changes option is used when you wish to undo any changes you have done. Clicking the Cancel Changes link will ask if you are sure you want to cancel your work. It will undo any changes made since the last time the page was saved, or in the case of a new page will remove all work and will not save the page.

**Note**: that any setting you have made to the navigation for the page will not be shown in the preview of a page. Navigation changes will not be displayed until after the page has been Saved & Launched.

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