schoolwires®

USER GUIDE

Chapter 4
Site Manager—Overview

Schoolwires Academic Portal
Version 4.0

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Introduction to Site Manager

P robably one of the biggest website issues that your organization faces is finding the time and the resources to keep the content of your website up to date and the *site* fresh. **Schoolwires**® has designed **Site Manager** to address this issue.

Site Manager makes your website both manageable and powerful.

- It allows many people to contribute to the *site* or *subsite(s)* while still enabling Site and Subsite Directors to maintain control. Site and Subsite Directors control not only what content specific audiences may view, but also who is authorized to make changes to the layout or content.

- It offers the ability to route content for approval before it is activated on the website.

- It enables non-technical people to easily add or edit content. Though it uses HTML (Hypertext Mark Up Language), Directors and Editors do not need to know HTML to enter content. They can enter content directly into the **Schoolwires Editor**, which is a WYSIWYG (<u>W</u>hat <u>Y</u>ou <u>S</u>ee <u>I</u>s <u>W</u>hat <u>Y</u>ou <u>G</u>et, pronounced, "Wizzy wig") editor. They can also cut and paste from other applications.

- It provides freedom for people with strong technical backgrounds to customize the website.

- It enables the creation of consistent layouts and navigation throughout the *site* and *subsite(s)*.

Editing Privileges in Site Manager

As explained in Chapter 3: "Site Structure, Navigation and User Registration," **Site Manager** has four levels of editing privileges. These levels are:

Site Directors

Site Directors have editing privileges for the main *site* and the *sections* and *pages* within that *site* as well as for any *subsites* and *sections* and *pages* within each of those *subsites*. The **Site Manager** navigation button appears on the *MyStart* bar as soon as a Site Director signs in and will appear on every *page* of the main *site* and all *subsites*. Clicking on it will allow access to the *Site Workspace* for the main *site* as well as to all *Subsite Workspaces*, and *Channel* and *Section Workspaces* for the main *site* and all *subsites*.

<u>Note</u>: A Site Director may enter **Site Manager** at a *Subsite Workspace* if on a *subsite* when signing in.

Subsite Director

Subsite Directors have editing privileges for a *subsite* and the *sections* and *pages* within that *subsite*. The **Site Manager** navigation button appears on the *MyStart* bar as soon as a Subsite Director signs in and navigates to the assigned *subsite*. It will appear on every *page* of that *subsite*. Clicking on it will allow access to the *Subsite Workspace* for that *subsite* as well as *Channel* and *Section Workspaces* for that *subsite*.

⚠ **Important: You cannot assign Site Directors as Subsite Directors, Homepage Editors or Section Editors for the main *site* or any *subsite*.** As Site Directors they can already have these editing privileges. **You cannot assign Subsite Directors as Homepage Editors or Section Editors on their assigned subsite.** They can, however be assigned these privileges at other *subsites* or on the main *site*. The *names of Site Directors and Subsite Directors will be missing* when the list of users for assigning editing privileges displays if they are not eligible for that editing privilege.

⚠ **Important**: Do not assign someone with a lower editing privilege as a Site Director or Subsite Director. That user profile may become corrupted if you do. To prevent this, remove that user from the lower editing privilege prior to assigning the Site or Subsite Director privilege.

Section Editor

Section Editors have editing privileges for specific *sections* on the main *site* or a *subsite* and all the *pages* within that *section*. Section Editors do not have editing privileges on any other *pages*, *sections*, *subsites* or the main *site* unless they have been assigned. The **Site Manager** navigation button appears on the *MyStart* bar as soon as a Section Editor signs in and navigates to the assigned *section*. Clicking on it will only allow access to the *Section Workspace* for that *section.*

Homepage Editor

Homepage Editors have editing privileges for the *homepage* of a *site* or *subsite*. Homepage Editors do not have editing privileges for any other *pages*, *sections* or *sites* unless they have been assigned. The **Site Manager** navigation button appears on the *MyStart* bar as soon as a Homepage Editor signs in and navigates to the *site* or *subsite* for the assigned homepage. However, clicking on it only provides access to the *Homepage Workspace* for that *site* or *subsite*.

Workspaces

Schoolwires has developed workspaces that coincide with these editing privileges. These *Workspace*s are:

- *Site Workspace*
- *Subsite Workspace*
- *Channel Workspace*
- *Section Workspace*
- *Homepage Workspace*

These workspaces are covered in more detail later in this chapter and in subsequent chapters.

Note: The *Homepage Workspace* is actually a subset of the tasks from either the *Site Workspace* or a *Subsite Workspace*. Only Homepage Editors will see *Homepage Workspaces* since Site Directors and Subsite Directors can already access the tasks on it from their respective workspaces.

Layout of Site Manager

The general layout of **Site Manager** is the same regardless of the level of the website being managed.
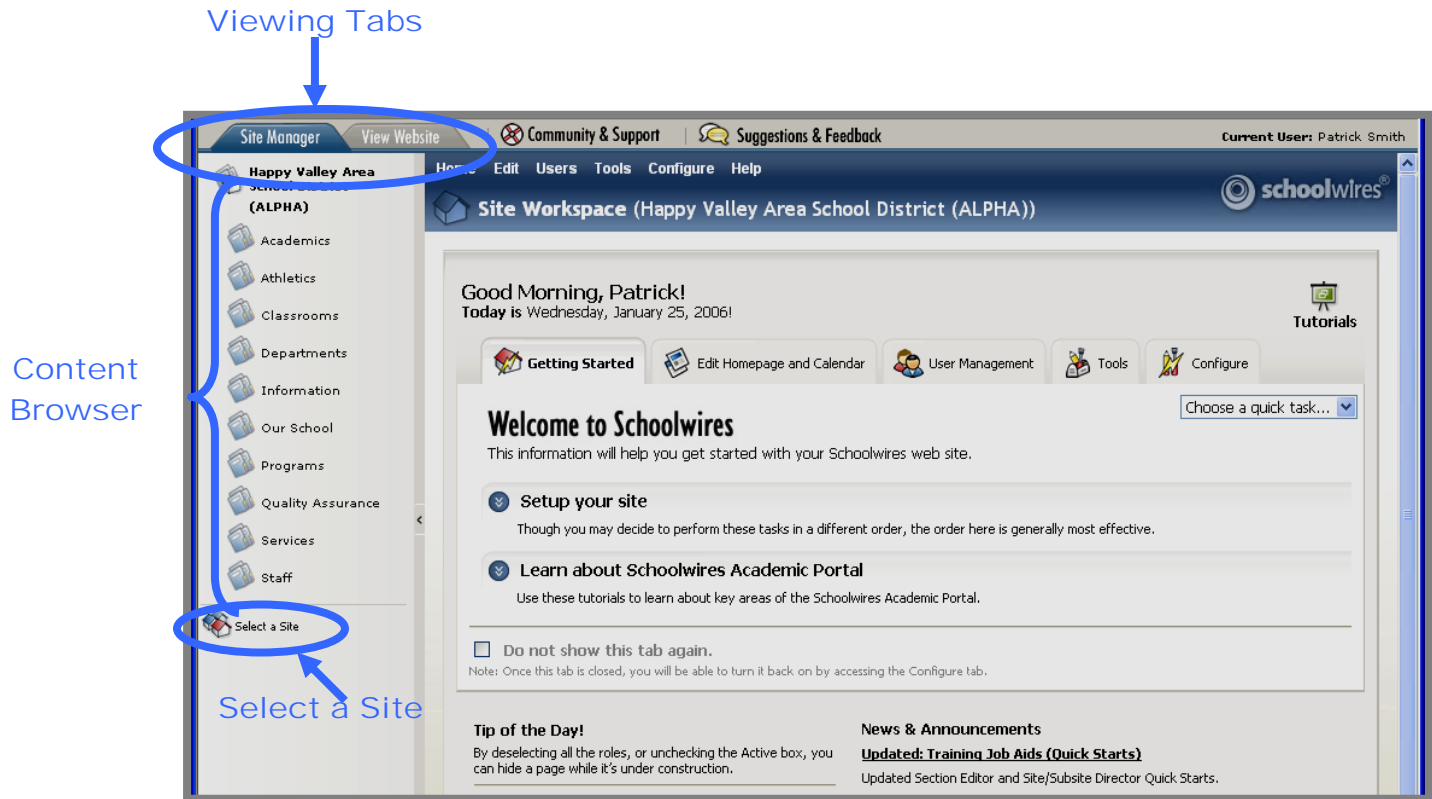

Exhibit 4-1: Site Workspace

Viewing Tabs

Notice the two tabs at the top of the **Site Manager** shown in Exhibit 4-1. These two tabs will appear at the top of each **Site Manager** when you access it, regardless of the level of the website you are managing.

Site Manager Tab

When you first access **Site Manager**, it will default to the **Site Manager** tab. The information on this tab will be in front and the tab itself will be shaded blue. You use this tab to access any of the available tasks of the **Site Manager** for the current editing level.

View Website Tab

When you click on the *View Website* tab, the information on that tab will move to the front and the tab itself will be shaded blue. Here you will see the refreshed website where you can view any changes you have made.

Note: After you access **Site Manager**, you will have two browser windows open:

- **Site Manager** browser window;

- Original website browser window.

TIP: Once you close out of the Site Manager browser, you should refresh your website browser to reflect any changes you have made.

Notice the link to *Community & Support* at the top of **Site Manager.** This is a link to the **Schoolwires** Help Site.

Regions on Site Manager

As you can see in Exhibit 4-1, each **Site Manager** is divided into two distinct regions. The region on the left is the *Content Browser* while the region on the right is the *Workspace*.

Site Manager Content Browser Region

The *Content Browser* on the far left displays the active *channels* and provides you with access to *sections* and *pages*. It uses a tree view that expands and collapses in response to clicking on the available *channels* or *sections*.

Notes:

- Only Site Directors will see the *Select a Site* button in the *Content Browser*. They will use this to navigate to other *sites* and *subsites*.

- The *Content Browser* is not available to Section Editors or Homepage Editors. (See Exhibits 4-5 and 4-6 later in this chapter.)

Once you leave the *Site Workspace*, you can return by:

- Clicking the *site* name at the top of the Content Browser;

- Clicking on the *Workspace* title;

- Clicking on *Home* on the Drop-down menu bar or in a breadcrumb.

The *Content Browser* is collapsible to enable you to enlarge the workspace. You collaspse and expand it by clicking on between *Content Browser* and the *Site* or *Subsite Workspace*. Exhibit 4-2 shows how **Site Manager** appears when the *Content Browser* has been collapsed in a *Site Workspace*.

Note: In the *Section* and *Homepage Workspaces*, the editors cannot expand and contract the *Content Browser*. It is contracted by default.

TIP: If you are a Site Director or a Subsite Director and you do not see a Content Browser, click on the to expand it.

Site Manager Workspace Region

The **Site Manager** *Workspace* is the region on the right-hand side. The tasks within the **Site Manager** *Workspace* will vary at each level of editing privilege. Remember there are separate workspaces used by each level of editing privilege.

The workspaces are color-coded with the workspace name in parenthesis. This provides you with a positive indication of your location.

- *Site/Subsite Workspaces* are blue. In addition, since a Homepage Editor is using a subset of the *Site/Subsite Workspaces*, that workspace is also blue and labeled as either a *Site* or *Subsite Workspace*.

- *Channel Workspaces* are red.

- *Section Workspaces* are green.

The different tasks within each of these workspaces are covered in more detail later in this chapter and in subsequent chapters.

Site/Subsite Workspace

Access to the Site/Subsite Workspace

Only Site Directors have access to the *Site Workspace*. They use it to manage the layout and content of the main *site,* and maintain information and settings for the entire website (e.g., user database). In addition, Site Directors have access to any of the organization's *Subsite Workspaces*.

Subsite Directors only have access to the *Subsite Workspace* for an assigned *subsite* and have no access to the *Site Workspace* for the main *site*.

Site Directors will access a *Site Workspace* like the one shown in Exhibit 4-2 to manage the main *site,* while Site Directors and Subsite Directors will access a *Subsite Workspace* like the one shown in Exhibit 4-3 to manage *subsites*. The name of the main *site* or *subsite* will appear in the title bar of the *Workspace* and at the top level of the *Content Browser*.
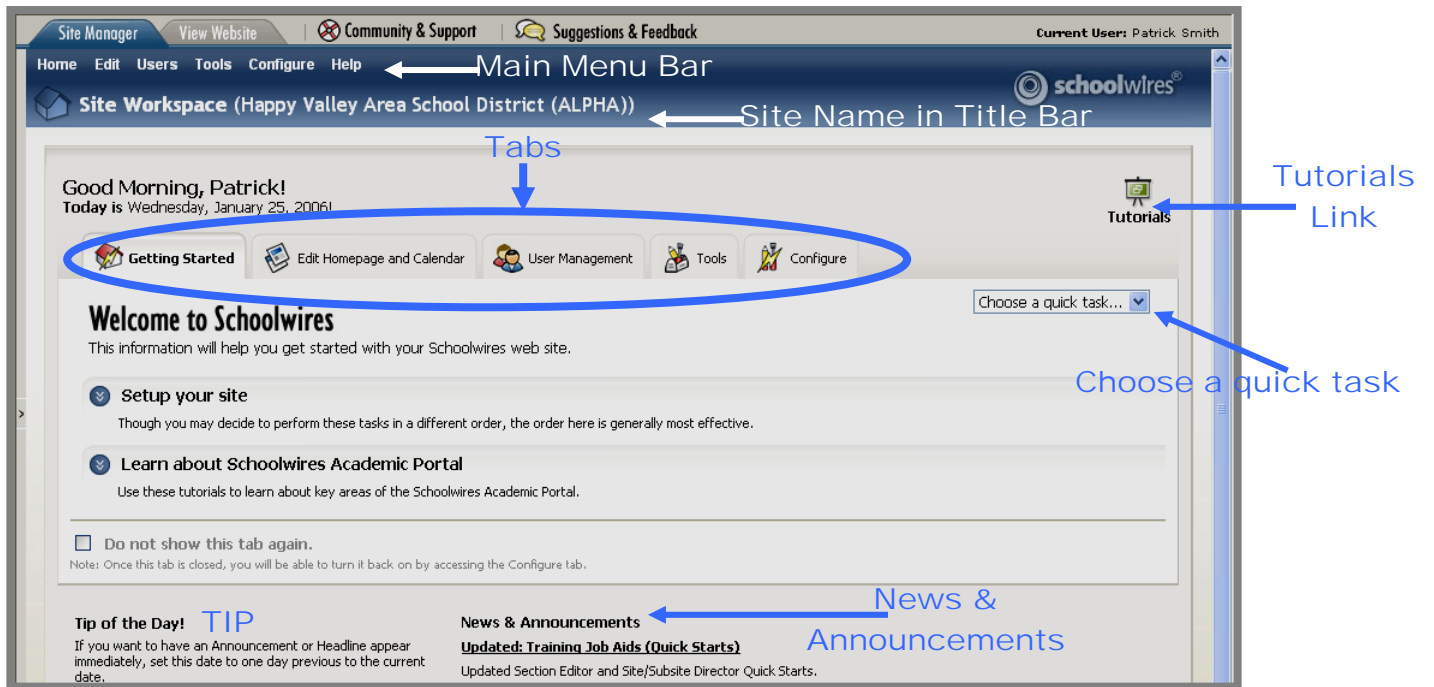

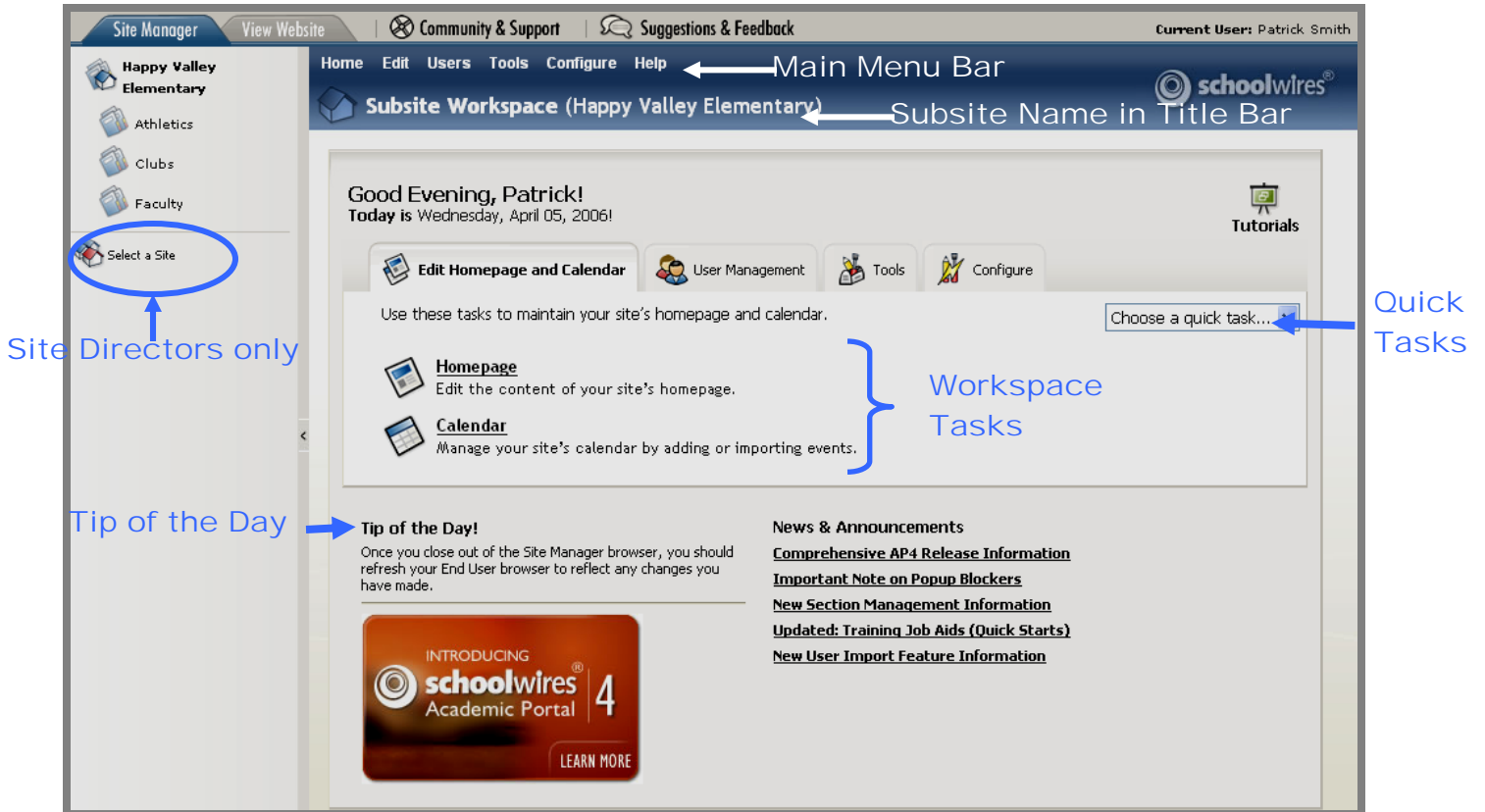**Exhibit 4-2: Site Workspace with Content Browser collapsed**

Exhibit 4-3: Subsite Workspace accessed by Site Director

TIP: Site Directors should check the title bar to be certain they are on the right site or subsite before making any changes.

Site and Subsite Workspace Tasks

Tasks that affect the entire website (i.e., all *sites* and *subsites*) are available only to Site Directors in the *Site Workspace*. In addition, some of the workspace tasks are not active unless enhancement modules are purchased. They may also need to be enabled by the Site Director to appear in *Subsite Workspaces*. The availability of a task is noted in the following list. See Chapter 5: "**Site Manager**—Site Workspace" for information on how to perform each of these tasks.

The workspace tasks and sub-tasks, along with a brief description of each of them, are listed here.

Getting Started Tab

Site Directors will use this tab for quick access to site set-up tasks and interactive tutorials for the **Schoolwires Academic Portal**. Once ready, the Site Director may elect to no longer view this tab by clicking in the box labeled "Do not show this tab again." See Chapter 5: "**Site Manager**—Site Workspace" for more information.

Edit Drop-Down Menu/Edit Homepage and Calendar Tab

Homepage Task

Site Directors and Subsite Directors will use this task to modify the content of the *site or subsite* homepage. Clicking on this task will bring up a template of the *site* or *subsite* homepage. The sub-tasks that are available from this template are:

- Edit Welcome Text

- Edit Announcements

- Edit Headlines & Features

- Edit Site Shortcuts (available if your organization has purchased **Styler**™ and placed Site Shortcuts in the homepage template)

Calendar Task

Site Directors and Subsite Directors will use this task to add or edit events for the *site* or *subsite* calendar. *Sections* may also have calendars. As you will see later in this chapter, these are managed in the *Section Workspace*.

Users Drop-Down Menu/User Management Tab

User Profiles Task (Site Workspace only)

Site Directors will use this task to:

- Import users in small or large batches.

- Register users if users do not register themselves or they were not included in an imported data file.

- Remove users.

- Modify user information, including viewing permissions (roles).

Role Management Task (Site Workspace only)

Site Directors will use this task to add, edit or remove custom viewing permissions (roles).

Site/Subsite Directors Task

Site Directors and Subsite Directors will use this task to assign or remove Site (in the *Site Workspace*) or Subsite Directors (in the *Subsite Workspace*). To be assigned as a Site or Subsite Director, a person must be a registered user of the website.

Homepage Editors Task

Site Directors and Subsite Directors will use this task to assign or remove Homepage Editors for the *site* or *subsite* they are managing. To be assigned as a Homepage Editor, a person must be a registered user of the website.

Tools Drop-Down Menu/Tools Tab

Files & Folders Task

Site Directors and Subsite Directors will use this task to organize and upload files and images to the website. It is an excellent tool for pre-planning the content of the website. Files and folders for the main *site* and any *subsite* reside in separate locations. These files are not shared. *Sections* also have files and folders. As you will see later in this chapter, these are managed in the *Section Workspace*.

Note: In Files & Folders in the *Site Workspace*, Site Directors have access to a Shared Library folder. Site Directors can upload files and images to this folder for use by all Subsite Directors, Homepage Editors and Section Editors at every *site* and *subsite*.

Web Address Mappings Task (Site Workspace only)

Site Directors will use this task to create friendly URLs for *sections* or *pages* within the website.

Site Templates (**Styler**™) Task

Styler™, an enhancement module, must have been purchased for this to be active in the *Site Workspace*. Site Directors maintain the active template and the template library for the *site* using this task. A Site Director must activate this task for *subsites* in order for a version of this task to appear in the *Subsite Workspace*. Subsite Directors can then apply available templates to their *subsites*.

Broadcast Alerts (E-Alerts) Task

E- Alerts is an enhancement module. If your organization has purchased this module, Site Directors and Subsite Directors will use the *Broadcast Alerts* task to send an email message to specific email addresses or to a group or multiple groups of users assigned the same viewing permissions (roles). This module also includes Content E-Alerts. These allow editors to send email notification to subscribers whenever the editors make significant changes to *pages* within *sections* or to the homepage or calendar. Most of these are activated from within the **Schoolwires Editor**. See Chapter 8: "Working with the **Schoolwires Editor**" for more information on content e-alerts.

Forms & Surveys Task

Site Directors will use this task to create and manage forms and surveys for the main *site* and *subsites*, while Subsite Directors will use it to create and manage forms and surveys for their respective *subsites*. This task is only available if your organization has purchased this enhancement module. With this module, Section Editors can also create forms and surveys. As you will see later in this chapter, these are managed in the *Section Workspace*.

Page Layouts Task

Site Directors and Subsite Directors will use this task to create and manage *page* layouts, which are *pages* that are pre-populated with content to assist editors in adding content.

Section Robot Task

Site Directors will use this task to add or import *sections* to the *site* and *subsites*. This task is only available in the *Site Workspace*. It is not available at the *subsite* level.

Content Routing Task

Site Directors and Subsite Directors will use this task to:

- Set up routing profiles for the *site* or *subsite* before activating content routing.

- Activate content routing at a *site* or *subsite*.

- Exempt editors from the routing process once routing is activated for a *site* or *subsite*.

Site Reports Task

Site Directors and Subsite Directors will use this task to view reports that will help manage the site or subsite.

Configure Drop-Down Menu/Configure Tab

Site Task

Site Directors use the *Site* sub-tasks to manage *site* information, the order of subsites, navigation and *MyStart* settings. Subsite Directors use it to manage some *subsite* settings. However, they control fewer settings than Site Directors.

- Site Settings

- Sort Subsites (*Site Workspace* only)

Channels Task

Site Directors and Subsite Directors use the *Channels* sub-tasks to manage channel information. Three subtasks are:

- Edit Channel Names (*Site Workspace* only)

- Assign Channels

- Sort Channels

Sections Task

Site Directors use the *Sections Configurations* sub-task to create *section* configurations for use when adding *sections* manually or with the *Section Robot*. *Section* configurations are a way of predefining the initial contents of *sections* by predefining the number and types of *pages* that will initially appear in each *section* using that configuration.

As you can see from Exhibit 4-2 and Exhibit 4-3, there are some items that always display when you are in the *Site/Subsite Workspace*. These items are:

- *Choose a Quick Task*—easy access to frequent tasks. These include:

  o *New Announcement*: This Quick Task takes you to a blank announcement form for adding a new announcement to the homepage.

  o *New Headline*: This Quick Task takes you to a blank article form for adding a new headline to the homepage.

  o *New Event*: This Quick Task takes you to a blank event form for adding a new event to the *site* or *subsite* calendar.

  o *New User*: This Quick Task takes you to a blank user form for adding a new user to the *site*. (*Site Workspace* only)

  o *New Section*: This Quick Task takes you to the *New Section* window in *Section Robot* for adding a new *section* to the *site* or *subsite*. (*Site Workspace* only)

  o *New Alert*: This Quick Task takes you to a blank alert form for creating a new Broadcast E-Alert. (Only available if your organization has purchased the E-Alerts enhancement module.)

  See Chapter 5: "**Site Manager**—Site Workspace" for about these Quick Tasks.

- *Tip of the Day*—helpful hints for creating and maintaining your **Schoolwires** website.

- *News & Announcements*—links to hot topics from **Schoolwires**.

  Link to Online Tutorials—links to interactive tutorials about the **Academic Portal**.

Channel Workspace

Access to the Channel Workspace

Only Site Directors have access to the *Channel Workspaces* on the main *site*. In addition, they have access to the *Channel Workspaces* on each of the organization's *subsites*.

Subsite Directors have access to the *Channel Workspace* on their assigned *subsites* only.

The *Channel Workspaces* on the main *site* and the *Channel Workspaces* on each of the *subsites* look and function in the same way. A Site/Subsite Director uses a *Channel Workspace* to manage all the *sections* within that *channel* on that *site* or *subsite*. Exhibit 4-4 shows an example of a *Channel Workspace* that both types of directors will use to manage *sections*. However, as you known, the *Select a Site* task under the *Content Browser* is only available to Site Directors.

TIP: Because the Channel Workspace looks and functions the same way on the site and subsites, it is critical that Site Directors know which site or subsite they are on before making changes.
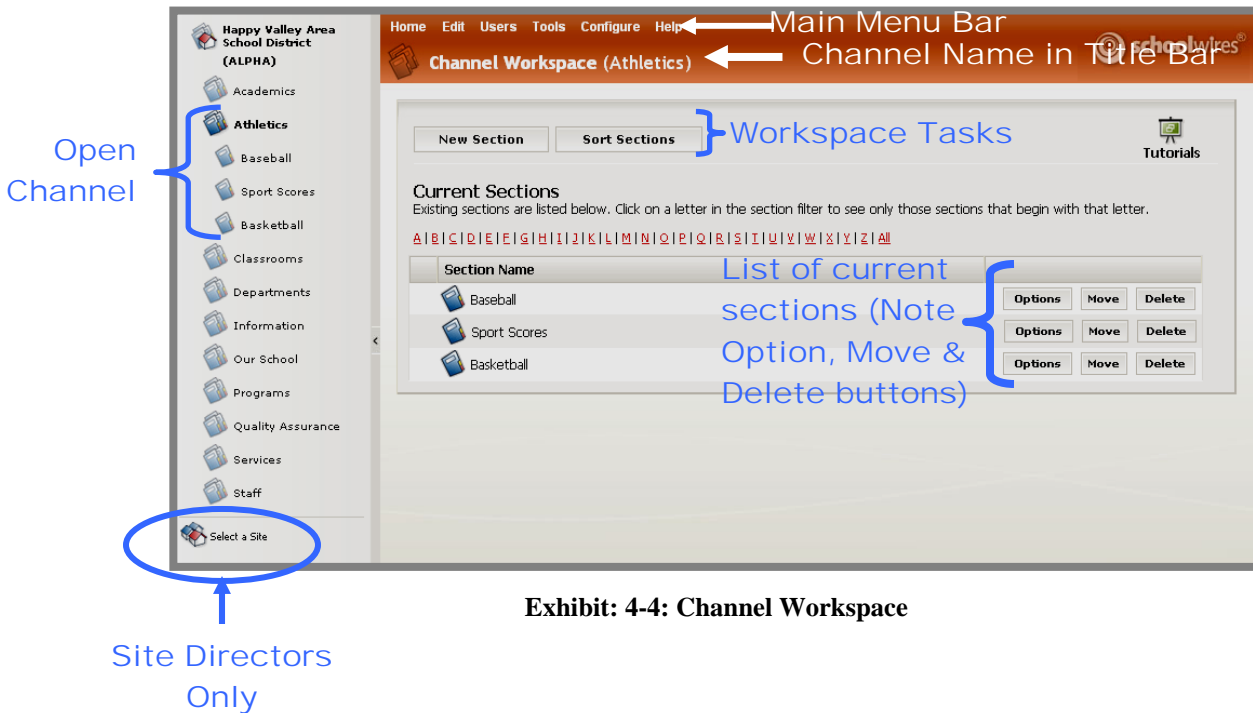
Exhibit: 4-4: Channel Workspace

Content Browser on Channel Workspace

As you can see from Exhibit 4-4, when you are working in the *Channel Workspace*, the selected *channel* will be open in the *Content Browser*, displaying all the *sections* currently in that *channel*. The *Content Browser* on the far left displays the active *channels* and provides you with access to *sections* and *pages*. It uses a tree view that expands and collapses in response to clicking on the available *channels* or *sections*.

Note: The *Content Browser* is not available to Section Editors or Homepage Editors. (See Exhibits 4-5 and 4-6 later in this chapter.)

TIP: If you are a Site Director or a Subsite Director and you do not see a Content Browser, click on the to expand it.

Channel Workspace Tasks

The name of the *channel* will display in parenthesis after *Channel Workspace* in the red title bar. The Main Menu Bar is the bar of either the *Site Workspace* or *Subsite Workspace*.

Notice that the *Channel Workspace* contains no Quick Tasks, Tips or News & Announcements, but does contain a link to Tutorials. The list of the *sections* currently in that *channel* will display at the top of the *Channel Workspace*.

Within the *Channel Workspace* Site Directors and Subsite Directors can perform two tasks. The two tasks are:

New Section Task

Site Directors and Subsite Directors will use this task to add a new *section* to that particular *channel*.

Sort Sections Task

Site Directors and Subsite Directors will use this task to change the order in which the *sections* appear on the *channel* drop-down list on the end user.

See Chapter 6: "**Site Manager**—Channel Workspace" to learn how to perform these tasks.

In addition, within the *Channel Workspace*, Site Directors and Subsite Directors manage existing *sections*. This includes removing *sections*, and setting or changing options for *sections*. The *section* options that are set or changed in the *Channel Workspace* include the options to:

- Change the *section* name.

- Change the menu name (i.e., the name that appears in the drop-down list or on the directory page) for that *section*.

- Turn the left navigation on or off for the *section*.

- Enable hierarchy navigation for the *section*.

- Restrict formatting within the *section* if your organization has purchased **Schoolwires Styler™**.

- Move the content of that *section* to another *channel.*

- Display or hide the *section* based on roles (viewing permissions).

- Choose a custom routing profile for the *section*, provided Content Routing has been activated for the *site* or *subsite*.

- Display a last modified date on every page in the *section* except the Overview page.

- Enable the creation of forms and surveys by the Section Editors for the *section* if your organization has purchased this additional software option.

Section Workspace

Access to the Section Workspace

Site Directors have access to the *Section Workspaces* of all the *sections* on the main *site* and all *subsites*.

Subsite Directors have access to the *Section Workspaces* of all the *sections* on their assigned *subsites*.

Section Editors only have access to the *Section Workspaces* for their assigned *sections*.

The *Section Workspaces* on the main *site* and the *Section Workspaces* on each of the *subsites* look and function in the same way. They simply control the *pages* and *page* options within a specific *section*. Exhibit 4-5 shows the *Section Workspace* that all editors will use to manage the *pages* within their assigned *sections*.

Note: Site Directors and Subsite Directors will see a *Content Browser* on the left unless they have collapsed it. The *Content Browser* is not available to Section Editors.

TIP: Because the Section Workspaces look and function the same way, it is critical that Site Directors and Subsite Directors be certain they are in the right section before making changes.

Exhibit 4-5: Section Workspace

Section Workspace Tasks

The name of the *section* will display in parenthesis after *Section Workspace* in the green title bar. Notice that the *Section Workspace* contains no Quick Tasks, Tips or News & Announcements, but does contain a link to Tutorials. The list of the *pages* currently in the *section* will display on the *Manage Pages* tab of the *Section Workspace*.

Within the *Section Workspace* there are three tabs containing tasks. You can also access the tasks using the Main Menu Bar which consists of a series of drop-down menus. The corresponding drop-down menu is shown in parenthesis on the following list. The tabs and tasks are:

Manage Pages Tab (Pages Drop-Down Menu)

New Page Task

Site Directors, Subsite Directors and Section Editors will use this task to add a *page* to a *section*. They can choose from a variety of page types.

Sort Pages Task

Site Directors, Subsite Directors and Section Editors will use this task to arrange the order in which the content *pages* appear in the *section* and in administrative lists.

Section Editors Tab (Users Drop-Down Menu)

Assign Editors Task

Site Directors, Subsite Directors and Section Editors will use this task to update a list of people who manage information for a particular *section*. To be assigned as a Section Editor, a person must be a registered user on the website.

Tools Tab (Tools Drop-Down Menu)

Files & Folders Task

This task is essentially the same as the Files & Folders task in the *Site Workspace*. However, Section Editors will use it to organize and upload files and images for use for a particular *section*. Files and folders for a *section* reside in a separate location from files and folders for a main *site*, *subsites* or other *sections*. These files are not shared.

Forms & Surveys Task (Enhancement Module)

Section Editors will use this task to create and manage forms and surveys for the *section*. This task will only display in the *Section Workspace* if your organization has purchased this module and the Site Director or Subsite Director has enabled it for the *section.*

See Chapter 7: "**Site Manager**—Section Workspace" to learn how to perform tasks.

Homepage Workspace

Access to the Homepage Workspace

The *Homepage Workspace* is a subset of the tasks from either the *Site Workspace* or a *Subsite Workspace*. Only Homepage Editors will see *Homepage Workspaces* since Site Directors and Subsite Directors can already access the tasks on it from their respective workspaces.

When Homepage Editors click on the **Site Manager** tab, they will see a *Homepage Workspace* like the one shown in Exhibit 4-6.

<u>Note</u>: The *Content Browser* is not available to Homepage Editors.

Exhibit 4-6: Homepage Workspace for a Main Site

Homepage Editors can access three Quick Tasks in the *Homepage Workspace*. The Quick Tasks are:

- *New Announcement*: This Quick Task takes you to a blank announcement form for adding a new announcement to the homepage.

- *New Headline*: This Quick Task takes you to a blank article form for adding a new headline to the homepage.

- *New Event*: This Quick Task takes you to a blank event form for adding a new event to the *site* or *subsite* calendar.

See Chapter 5: "**Site Manager**—Site Workspace" for more information on the tasks associated with these Quick Tasks.

The *Homepage Workspace also* contains:

- *Tip of the Day*—helpful hints for creating and maintaining your **Schoolwires** website.

- *News & Announcements*— links to hot topics from **Schoolwires**.

- *Link to Online Tutorials*—links to interactive tutorials about the **Academic Portal**.

Homepage Workspace Tasks

Notice Homepage Editors only have access to two tasks within the *Homepage Workspace*. These two tasks are:

Homepage Task

Homepage Editors use this template to modify the content of the *site or subsite* homepage. Clicking on this task brings up a template of the *site or subsite* homepage. The sub-tasks that are available from this template are:

- Edit Welcome Text

- Edit Announcements

- Edit Headlines & Features

- Edit Site Shortcuts (available if your organization has purchased **Styler**™ and placed Site Shortcuts in the homepage template)

Calendar Task

Homepage Editors will use this task to add or edit events for the calendar on the assigned *site* or *subsite*.