revize.

The Government Website Experts

Guide to Content Editing

Contents

1 About This Guide

This guide explains how nontechnical editors can add, edit, and delete content on **Revize-enabled** web pages. Web developers create **Revize-enabled** web sites using the **Revize Web Content Management System** (**CMS**). When content owners log into a **Revize-enabled** site, pages display simple, easy-to-use editing tools. This guide explains how to use those tools to add and edit pages, navigational links, and page content.

Section 14, Using the Revize Letter Email System (page 99), also explains how to use Revize Letter, a versatile, easy-to-use email marketing and communication tool often installed alongside **Revize-enabled** web sites.

Note: words in bold font are defined in the Glossary on page 114.

1.1 Users of This Guide

This guide is written for nontechnical editors with privileges to edit the content on **Revise-enabled** web pages. Content editors need only basic computer skills to use the simple edit forms and versatile text editor found on those pages to add and edit content. An understanding of **HTML** (**Hypertext Markup Language**), the computer code used to format web pages, is not required.

1.2 Topics Covered in the Guide

These topics are presented in the guide:

- Finding and Editing Content Areas, page 40
- Using the Rich Text Editor, page 49
- Creating Forms and Fields, page 75
- Creating and Editing Calendar Events, page 82
- Editing Metadata, page 85
- Editing Permissions, page 86
- Selecting Workflows, page 96.
- Using the Revize Letter Email System, page 99.

A Glossary of terms used in the guide appears on page 114.

1.3 Software Requirements

Most editing tasks described in this guide can be performed with any web browser. However, to use all the features of Revize Letter, you must use Microsoft Internet Explorer.

1.4 Conventions Used in the Guide

This guide uses typographical devices to improve readability:

- **Options**, **commands**, **icons**, and **links** you click to activate are presented in this version of Arial font.
- Words defined in the Glossary are in **bold font** wherever they occur in the guide.
- Text that may vary and that is displayed by your computer or typed into text fields is presented in `Courier New font`.
- Text following a **Note:** or **Caution:** the label has a specific purpose depending on the label:

Note: draws attention to a point. It does not alert you to the potential for loss of information or unintended action by an editing tool or command.

Caution: warns of the potential for loss of information or unintended action by an editing tool or command.

1.5 Technical Notes

When editing web pages, keep these technical tips in mind:

- If you do not see changes after making them, try reloading (refreshing) the page in your browser.
- When you cut, copy, or paste text with the rich text editor, you may need to use the shortcut keys on your computer for those actions instead of the rich text editor commands. These are the editing shortcuts used by the Microsoft Windows operating system:

  Control key + x cuts selected text.

  Control key + c copies selected text.

  Control key + v pastes copied text at the cursor location.

1.6 Contacting Revize Customer Support

You can call Revize Customer Support at 248-269-9263 x 34 or email Revize Customer Support at support@revize.com. You can also visit Revize online at https://www.revize.com.

2 Logging In and Out as a Content Editor

You can log into a **Revize-enabled** website by opening the site in any web browser. However, if you want to use all the features of Revize Letter (see page 99), you must use Microsoft Internet Explorer.

2.1 Logging In

At the bottom of most **Revize-enabled** pages, you will find a **Login** link. Click **Login** to open the login dialog box, Please log in to Update Site. Enter your user name and password. Then click **log in**. The web page opens with editable areas indicated by buttons that open edit forms.

2.2 Logging Out

To log out, click the **Login** link at the bottom of any page. The login dialog box, Please log in to Update Site, opens. Click **Logout**. The web site opens again without showing editable areas.

2.3 Changing Your Password

To change your password, open the login dialog box by clicking **Login** at the bottom of any page. On the login page that appears, click the “Oh snap! I forgot my password” hyperlink. It will ask for your username or email to send a password reset email.

3 Overview of Revize Content Editing

Revize Web CMS allows content owners to add and edit the content for which they are responsible without having to edit web page code. The uniform style and formatting of the web site—the site’s branding and look—are preserved in the process.

3.1 Revize Web CMS Operating Model

Web developers with knowledge of web page coding and web page authoring software design and create **Revize-enabled** web sites. Developers also specify which elements of a site's pages will be editable and create the edit forms content owners will use to add and update content.

After web developers create a **Revize-enabled** site, the site's administrator assigns permissions to each content editor. The permissions determine which elements of the site each editor can edit. Administrators can limit an editor's permissions to specific pages, parts of pages, or even specific paragraphs.

A workflow management system within **Revize Web CMS** automates the notification, review, and approval of content editors' changes. **Revize Web CMS** also maintains audit trails of changes and preserves older versions of content.

3.2 Finding Editable Elements on Web Pages

After you log into your web site, the site will re-open in your browser with edit buttons displayed on each page indicating editable areas. Clicking an edit button opens a contextual edit form used for editing that element of the page. Here are a few common edit buttons and the editing functions they perform:

- **New**—adds a news and information list item, link, or another element
- **Edit**—edits a list item, link, or another element
- **Del**—deletes a list item, link, or another element
- **Edit Top Link**—edits the navigational tabs at the top of a page
- **Edit Top Nav**—edits the navigational links and sublinks at the top of a page and below the navigational tabs
- **Edit This List**—edits the list of links along the side of a page

- **Edit Center Area**—edits the main content area of a page
- **Edit Banner**— edits a page's title banner
- **Edit Flash**—edits a flash presentation of images
- **Edit News Links**—edits highlight news panels
- **Permissions**—edits the permissions assigned to editors
- **Edit Meta Data**—edits information not displayed on pages but accessed by search engines
- **Edit Globals**—edits footer information shown on all pages
- **Edit Footer Link**—edits links in a page's footer.

3.3 Using Content Editing Tools

Clicking an edit button always opens a contextual edit form. Some edit forms also present the system's rich text editor, which is used for adding and formatting text and images.

3.3.1 Contextual Edit Forms

Contextual edit forms allow you to perform actions by making a few simple choices. For example, the Image Manager is a contextual edit form that allows you to select or upload images to the system for various uses.

3.3.2 Rich Text Editor

Some contextual edit forms also display a rich text editor. The rich text editor operates very much like a word processor and allows content editors to add and format text, images, and tables to make a pleasing presentation.

4 Editing Navigational Links: Creating and Deleting Pages and Subpages

This section explains how to add, edit, and delete the links found in top link tabs, top navs, side link lists, and footer links:

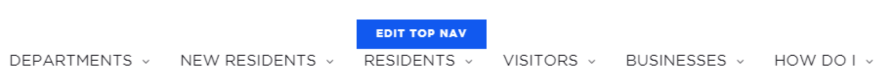
- Top link tabs are the rows of tabs found at the tops of pages of many web sites. Top link tabs contain links for navigating to major sections of sites.
- Top navigations or top navs for short are the rows of links below top link tabs. Top navs offer additional navigational choices. In addition, top nav links may display sublinks and sub-sublinks to various pages.
- Side link lists are lists of navigational links typically placed in a box along the left margin of a page.
- Footer links are navigational links placed in page footers.

4.1 Editing Top Navigation Links and Sublinks

Clicking **Edit Top Nav** allows you to add, edit, or delete the navigational links usually placed below top link tabs at the tops of pages. You can also change the order in which the top nav links are placed. Here is a top nav link that has been opened showing a sublink and sub-sublink:

4.1.1 Opening the Menu Manager

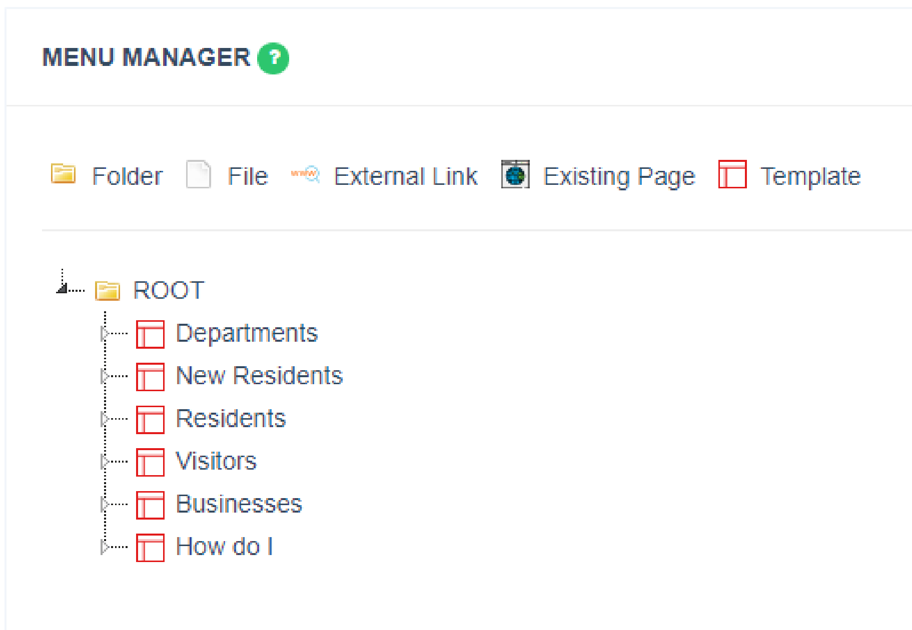
When you click **Edit Top Nav** to add, edit, or delete a top nav



link, the Menu Manager opens. In this example, the page, subpage, and sub-sub page links of the previous example have been selected and are shown in red:

The Menu Manager presents these options for adding, editing, and deleting top nav links:

- Clicking a page title or ⊞ reveals the page's subpages and a **New Page** button for creating a new subpage.
- **New Page** opens the Link Manager, which you can use to create a new top nav link to a new or existing web page. You can also create a new link to a file, such as a **PDF** document.



- **Edit** opens the Link Manager, which you can use to edit the corresponding top nav link.
- **Del** deletes the corresponding top nav link.
- The number in the Sequence column shows the relative position of each top nav link.

4.1.2 Adding a Top Nav Link with the Link Manager

To add a new top nav link, follow these steps:

1. Click **Edit Top Nav**. The Menu Manager opens.

2. Click **New Page**. Clicking **New Page** below an existing link creates a sublink. The Link Manager dialog box opens (see page 16).

3. Enter the name to appear on the top nav link in the field following Text Displayed for Link.

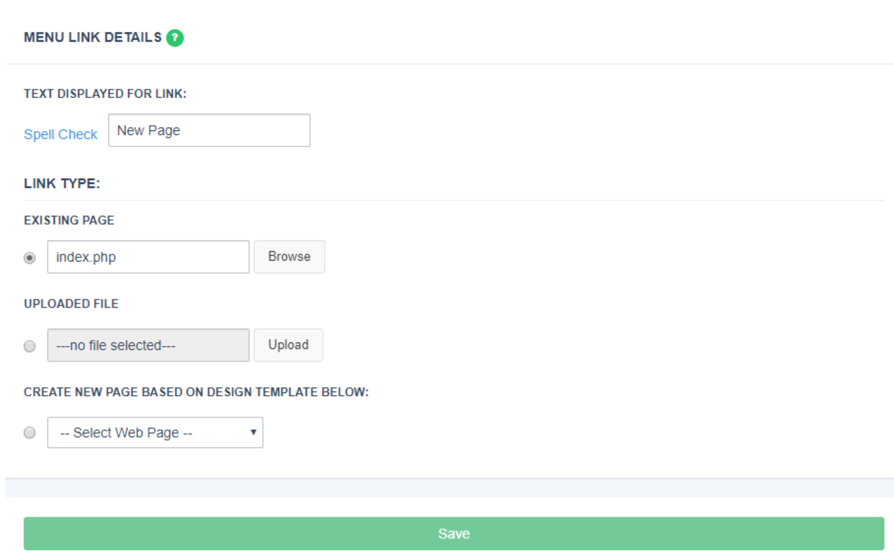
4. Enter a number indicating the relative position of the top nav link in the field following Link Sequence Number.

5. Below Select Type of Link from choices below, select one of the following:

   - Select **None** if you want to link to nothing.

   - Select **Existing Page** if you want to link to an existing web page. Enter the **URL** of the page in the field following Existing Page.

   - Select **Uploaded File** if you want to link to a file, such as a **PDF** document. Click the **upload file** to select a file or upload a new file to the system. The File Manager dialog box opens. See Using the File Manager when Creating Links on page 29 for instructions on selecting a file for your link.



- Select **Create New Revize Web Page** if you want to link to a new web page.

  Select a template for the new web page by opening the drop-down menu below Select Create New Revize Web Page.

  You may enter an **HTML** file name for the new page in the field following Filename for HTML Page if you want to change the name automatically chosen. The file name never appears on the web page.

  If you want the new page to be a **section home page**, select **Yes** following Should page start a new department or **section**. Otherwise, select **No**. For an explanation of **sections** and pages, see Web Site Sections and Pages on page 87 or move your mouse pointer over ? in the Link Manager.

6. If you want your new page or document to open in a new browser window, select **Yes** following Open Page in a New Window. To have the page or document open in the same browser window, select **No**.

7. After making your entries and selections in the Link Manager, click **Continue**. Your changes are published, and the Menu Manager re-opens, where your new top nav link is listed.

8. To view your new link, click **Exit** in the Menu Manager. A web page will open displaying your site's top nav links.

9. If your new top nav link links to a new page, you can add content to the page by clicking its link. The page opens and displays edit buttons for editable page elements.

4.1.3 Editing a Top Nav Link

To edit an existing top nav link, follow these steps:

1. Click **Edit Top Nav**. The Menu Manager opens.
2. Click **Edit** by the link you want to edit. The Link Manager dialog box opens for editing the link's properties. You can now:
    - change the text displayed on the link
    - change the position (sequence number) of the link
    - change the link to link to a new or existing page
    - change the link to link to an uploaded file
    - change the file name of the page for the link
    - change whether the page opens in a new window or not.
3. After making your changes in the Link Manager, click **Continue**. Your changes are published, and the Menu Manager re-opens, where your top nav link is listed.
4. To view your link, click **Exit** in the Menu Manager. A web page will open displaying your site's top nav links. If you have edited the tab to link to a new page, click the tab to open the new page, where you can add content and links.

4.1.4 Deleting a Top Nav Link

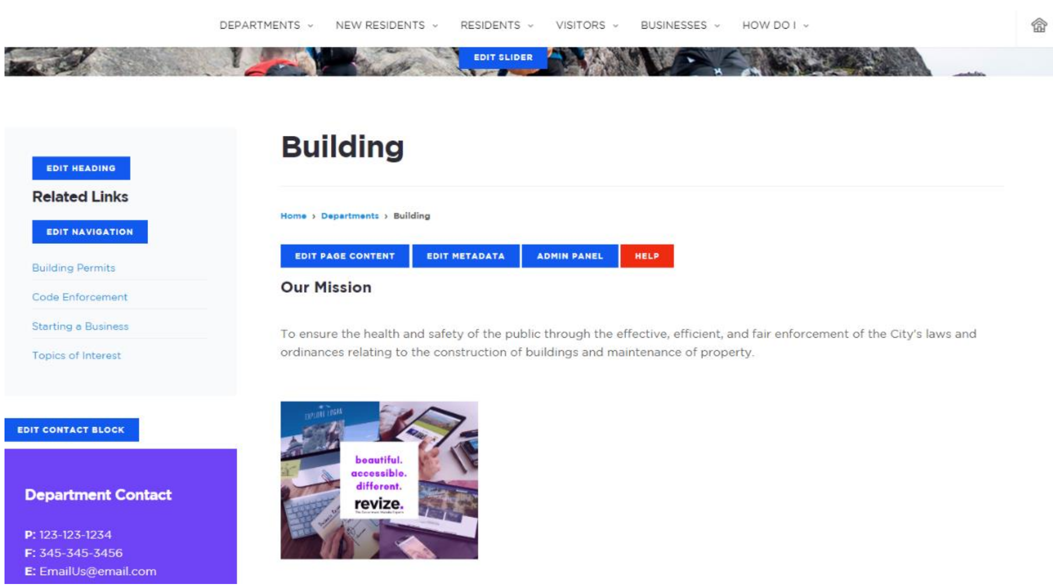
Caution: when you delete a top nav link, the page the link opens and its content may be deleted. You may not be able to create a link to the **URL** of the deleted page, and you will have to create a new page if you wish to use the original page again. Before deleting a link, record its **URL**. The page may remain in the system for future use.

To delete a top nav link, click **Edit Top Nav**. The Menu Manager opens. Click **Del** by the link you want to delete. A dialog box, Ok to Delete This Item? opens. Click **OK**. The link is deleted.

Note: you cannot delete a top nav link unless all its sublinks are deleted.

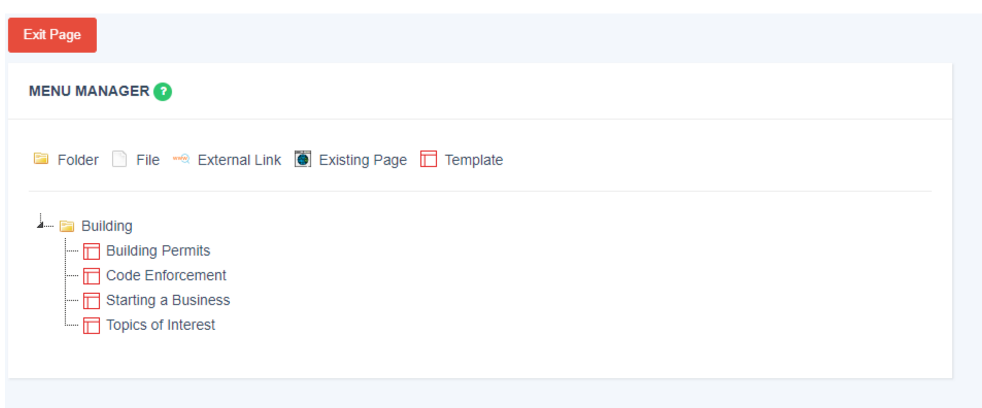
4.2 Editing Side Links

Clicking **Edit This List** allows you to add, edit, or delete links in a side links list. You can also change the order in which the side links are placed. Here is an example of a side links list:



4.2.1 Opening the Menu Manager

When you click **Edit This List** to add, edit, or delete a side link, the Menu Manager opens:



When side links are shown in the Menu Manager, the title of the page on which the links are placed is shown in red as Section Home.

The Menu Manager presents these options for adding, editing, or deleting side links:

- **New Page** opens the Link Manager, which you can use to create a new side link to a new or existing web page. You can also create a new link to an existing file, such as a **PDF** document.
- **Edit** opens the Link Manager, which you can use to edit the corresponding side link.
- **Del** deletes the corresponding side link.

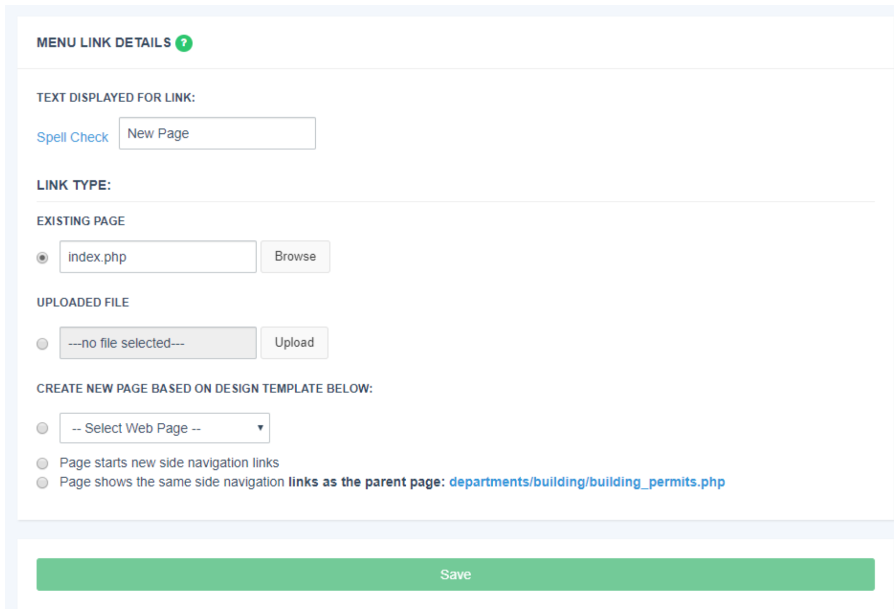
The number in the Sequence column shows the relative position of each side link.

4.2.2 Adding a Side Link with the Link Manager

To add a new side link, follow these steps:

1. Click **Edit This List**. The Menu Manager opens.
2. Click **New Page** in the Menu Manager. The Link Manager dialog box opens (see page 22).
3. Enter the name to appear on the side link in the field following Text Displayed for Link.
4. Enter a number indicating the relative position of the side link in the field following Link Sequence Number.
5. Below Select Type of Link from choices below, select one of the following:
    - Select **None** if you want to link to nothing.

- Select **Existing Page** if you want to link to an existing web page. Enter the **URL** of the page in the field following Existing Page.



- Select **Uploaded File** if you want to link to a file, such as a **PDF** document. Click the **upload file** to select a file or upload a new file to the system. The File Manager dialog box opens. See Using the File Manager when Creating Links on page 29 for instructions on selecting a file for your link.
- Select **Create New Revize Web Page** if you want to link to a new web page.

  Select a template for the new web page by opening the drop-down menu below Select Create New Revize Web Page.

  You may enter an **HTML** file name for the new page in the field following Filename for HTML Page if you want to change the name automatically chosen. The file name never appears on the web page.

If you want the new page to be a **section home page**, select **Yes** following Should page start a new department or **section**. Otherwise, select **No**. For an explanation of **sections** and pages, see Web Site Sections and Pages on page 87 or move your mouse pointer over in the Link Manager.

6. If you want your new page or document to open in a new browser window, select **Yes** following Open Page in a New Window. To have the page or document open in the same browser window, select **No**.

7. After making your entries and selections in the Link Manager, click **Continue**. Your changes are published, and the Menu Manager re-opens, where your new side link is listed.

8. To view your new link, click **Exit** in the Menu Manager. A web page will open displaying your page's side links.

9. If your new side link is to a new page, you can add content to the page by clicking its tab. The page opens and displays edit buttons for editable page elements.

4.2.3 Editing a Side Link

To edit an existing side link, follow these steps:

1. Click **Edit This List**. The Menu Manager opens.

2. Click **Edit** by the link you want to edit. The Link Manager dialog box opens for editing the link's properties. You can now:

   - change the text displayed on the link
   - change the position (sequence number) of the link
   - change the link to link to a new or existing page
   - change the link to link to an uploaded file

- change the file name of the page for the link
- change whether the page opens in a new window or not.

3. After making your changes in the Link Manager, click **Continue**. Your changes are published, and the Menu Manager re-opens, where your new side link is listed.
4. To view your link, click **Exit** in the Menu Manager. A web page will open displaying your page's side links. If you have edited the link to link to a new page, click the link to open the new page, where you can add content and links.

4.2.4 Deleting a Side Link

Caution: when you delete a side link, the page the link opens and its content may be deleted. You may not be able to create a link to the **URL** of the deleted page, and you will have to create a new page if you wish to use the original page again. Before deleting a link, record its **URL**. The page may remain in the system for future use.

To delete a side link, click **Edit This List**. The Menu Manager opens. Click **Del** by the link you want to delete. A dialog box, Ok to Delete This Item? opens. Click **OK**. The link is deleted.

4.3 Editing Footer Links

Clicking **Edit Footer LInk** allows you to add, edit, or delete footer links. You can also change the order in which the footer links are placed. In this example, Disclaimer, Privacy Policy, and Feedback are

footer links:

4.3.1 Opening the Menu Manager

When you click **Edit Footer LInk** to add, edit, or delete a footer link, the Menu Manager opens:

The Menu Manager presents these options for adding, editing, or deleting footer links:

- **New Page** opens the Link Manager, which you can use to create a new footer link to a new or existing web page. You can also create a new link to an existing file,

  such as a **PDF** document.

- **Edit** opens the Link Manager, which you can use to edit the corresponding footer link.

- **Del** deletes the corresponding footer link.

The number in the Sequence column shows the relative position of each footer link.

4.3.2 Adding a Footer Link with the Link Manager

To add a new footer link, follow these steps:

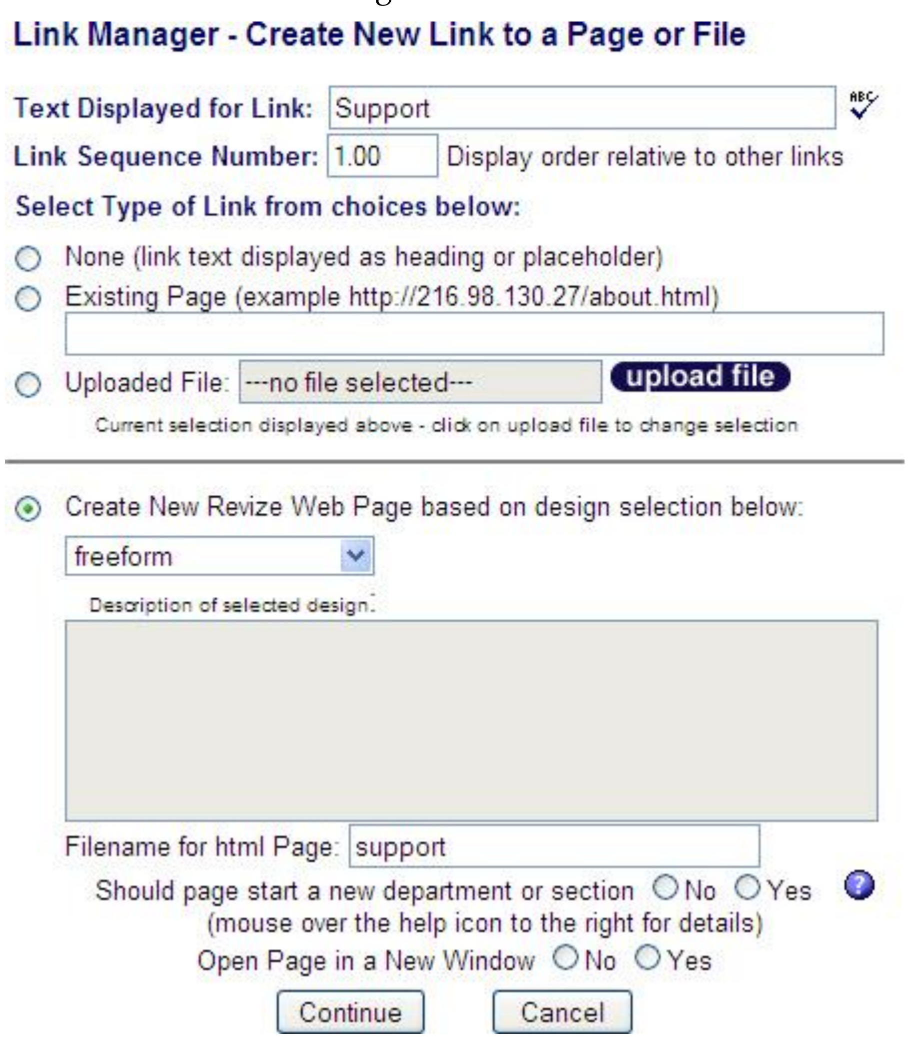
1. Click **Edit Footer Link**. The Menu Manager opens.

2. Click **New Page** in the Menu Manager. The Link Manager dialog box opens:

3. Enter the name to appear on the footer link in the field following Text Displayed for Link.

4. Enter a number for the relative position of the footer link in the field following Link Sequence Number.

5. Below Select Type of Link from choices below, select one of the following:



- Select **None** if you want to link to nothing.

- Select **Existing Page** if you want to link to an existing web page. Enter the **URL** of the page in the field following Existing Page.

- Select **Uploaded File** if you want to link to a file, such as a **PDF** document. Click the **upload file** to select a file or upload a new file to the system. The File Manager dialog box opens. See Using the File Manager when Creating Links on page 29 for instructions on selecting a file for your link.

- Select **Create New Revize Web Page** if you want to link to a new web page.

- Select a template for the new web page by opening the drop-down menu below Select Create New Revize Web Page.

  You may enter an **HTML** file name for the new page in the field following Filename for HTML Page if you want to change the name automatically chosen. The file name never appears on the web page.

  If you want the new page to be a **section home page**, select **Yes** following Should page start a new department or **section**. Otherwise, select **No**. For an explanation of **sections** and pages, see Web Site Sections and Pages on page 87 or move your mouse pointer over ? in the Link Manager.

6. If you want your new page or document to open in a new browser window, select **Yes** following Open Page in a New Window. To have the page or document open in the same browser window, select **No**.

7. After making your entries and selections in the Link Manager, click **Continue**. Your changes are published, and the Menu Manager re-opens, where your new footer link is listed.

8. To view your new link, click **Exit** in the Menu Manager. A web page will open displaying your site's footer links.

9. If your new footer link is to a new page, you can add content to the page by clicking its tab. The page opens and displays edit buttons for editable page elements.

4.3.3 Editing a Footer Link

To edit an existing footer link, follow these steps:

1. Click **Edit Footer Link**. The Menu Manager opens.

2. Click **Edit** by the link you want to edit. The Link Manager dialog box opens for editing the link's properties. You can now:

    - change the text displayed on the link
    - change the position (sequence number) of the link
    - change the link to link to a new or existing page
    - change the link to link to an uploaded file
    - change the file name of the page for the link
    - change whether the page opens in a new window or not.

3. After making your changes in the Link Manager, click **Continue**. Your changes are published, and the Menu Manager re-opens, where your new footer link is listed.

4. To view your link, click **Exit** in the Menu Manager. A web page will open displaying your page's footer links. If you have edited the link to link to a new page, click the link to open the new page, where you can add content and links.

4.3.4 Deleting a Footer Link

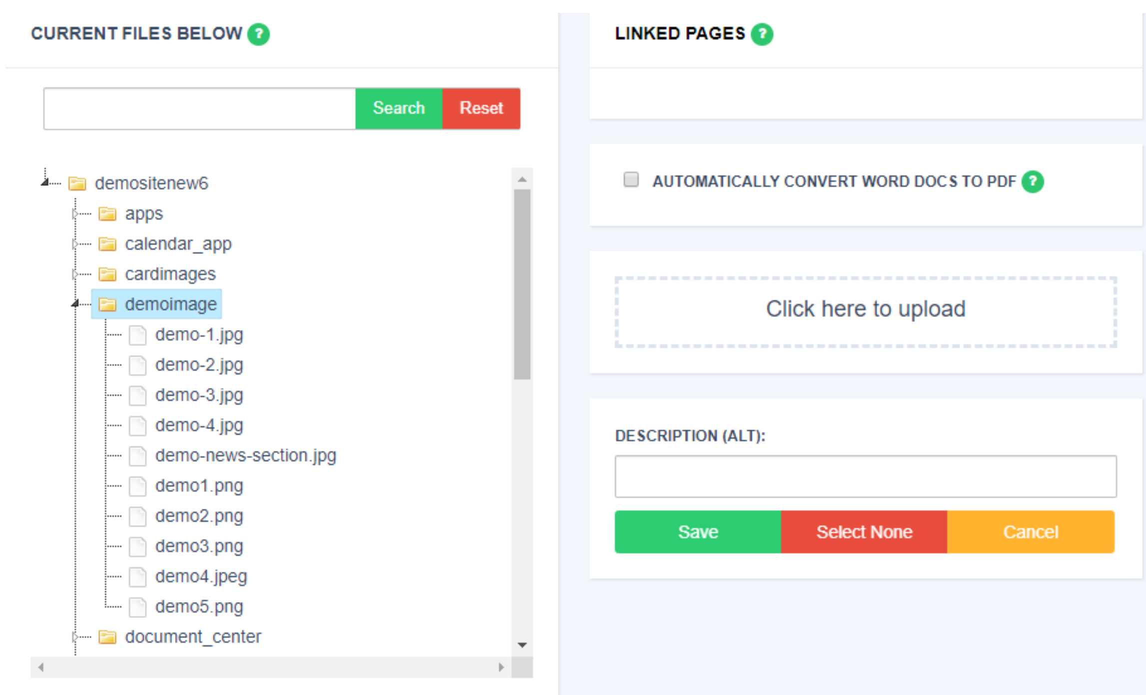
Caution: when you delete a footer link, the page the link opens and its content may be deleted. You may not be able to create a link to the **URL** of the deleted page, and you will have to create a new page if you wish to use the original page again. Before deleting a link, record its **URL**. The page may remain in the system for future use.

To delete a footer link, click **Edit Footer Link**. The Menu Manager opens. Click **Del** by the link you want to delete. A dialog box, Ok to Delete This Item? opens. Click **OK**. The link is deleted.

4.4 Using the File Manager when Creating Links

When you create or edit a navigational link, you can have the link open a file instead of a web page. For example, the link can open an Adobe **PDF** document or Microsoft Word document.

To make a navigational link open a file, you create the link or edit an existing link using the Link Manager as explained above. When the Link Manager opens, select **Uploaded File** under Select Type of Link from the choices below. Then click the **upload file**. The File Manager opens (see page 29).



4.4.1 Selecting an Existing File

The link you are creating or editing can link to an existing file. To select an existing file in the File Manager and save it to the Link Manager, follow these steps:

1. Click the file name of the existing file in the column of files and folders. To open a folder to view its files, click the folder icon or name. The filename of the file you select appears in the field Currently Selected File, and the descriptive name of the file appears in the Description field.

2. You can change the descriptive name now. The name you enter in the Description field will appear as the link text in the Link Manager.

3. To save the file to the Link Manager, click **Save**. The Link Manager opens showing your selection.

4.4.2 Adding a File to the File Manager

To add a file to the File Manager, follow these steps:

1. If you want to upload your file to an existing folder in the File Manager, click the folder name to highlight it.

2. Click **Browse** under Click on Browse to Upload File. The File Upload dialog box opens showing the files and folders on your computer.

3. Click the file you want to upload.

4. Click **Open**. The file you selected is added to the files in the File Manager.

Note: you cannot upload a folder to the File Manager.

4.4.3 Creating a Folder in the File Manager

To create a new folder in the File Manager, follow these steps:

1. Click **Create New Folder**. The Create New Folder dialog box opens.

2. Enter the name of your new folder in the Folder Name field.

3. Click **OK**. The folder is added to the File Manager.

Note: a folder name cannot contain spaces.

4.4.4 Deleting Files and Folders from the File Manager

To delete a file or folder from the File Manager, follow these steps.

1. Click the file or folder name to highlight it.

2. Click **Delete Above Selection.** The Delete selected image dialog box opens.

3. Click **OK**. The file or folder is deleted.

Note: deleting a file or folder may require additional steps depending on how the file or folder is being used. In that case, additional instructions are presented.

5 Editing Banners and Flash Presentations

A web site's title banner and its flash presentations of series of images may be editable by content editors.

5.1 Changing the Web Site Title Banner

Your web site title banner is an image that displays the name of your site at the tops of its pages. To change the title banner image, follow these steps:

1. Click **Edit Banner**. The Banner Edit Form opens:

2. Click the **change image**. The Image Manager opens.
3. In the Image Manager, select an existing image or upload your own image and select it.
4. Enter a description for your image in the Description (alt) field. The description will display when a reader moves the mouse arrow over the image.
5. Click **Save**. The Banner Edit Form opens showing the image you selected.
6. Click **Save**. Your changes are saved and the web site displays your new banner.

See Using the Image Manager on page 37 for additional instructions.

5.2 Editing a Flash Presentation of Images

Flash presentations present a series of images one after another, usually just below the web site title banner. To edit a flash presentation, click **Edit Flash**. The Flash Edit List opens (see page 34).

Beginning at the Flash Edit List, you can edit the properties of the flash presentation and change the images displayed by the presentation.

5.2.1 Editing the Flash Status

The flash status of a flash presentation determines whether the flash appears on all the pages of a site (global status), on only a specific page and its sub linked pages (unique flash), or on no web site pages (No Flash). Follow these steps to edit the flash status of a flash presentation.

1. Click **Edit Flash**. The Flash Edit List opens.
2. Click **Edit** next to Flash Status. The Flash Status Edit Form opens.

3. Select **Global Flash**, **Unique Flash**, or **No Flash**.

4. Click **Save**. Your selection is shown on the Flash Edit List.

5.2.2 Editing the Height and Width of Flash Images

Follow these steps to change the size (height and width) of the images in a flash presentation:

1. Click **Edit Flash**. The Flash Edit List opens.

2. Click **Edit** next to Height and Width. The Flash Height & Width Edit Form opens.

3. Change the height and width (in pixels) shown in the edit form.

4. Click **Save**. Your changes are made and shown in the Flash Edit List.

Note: by clicking **History** in the Flash Height & Width Edit Form, you can view the history of editing the flash and access previous versions of the flash.

5.2.3 Adding a New Flash Image

Follow these steps to add a new image to a flash presentation:

1. Click **Edit Flash**. The Flash Edit List opens.

2. Click **New**. The Banner Edit Form opens.

3. Click **change Image**. The Image Manager opens.

4. In the Image Manager, select an existing image or upload your own image and select it.

5. Enter a description for your image in the Description (alt) field. The description will display when a reader moves the mouse arrow over the image.

6. Click **Save**. The Banner Edit Form opens showing the image you selected.

7. Click **Save**. Your changes are saved and the web site displays your new flash presentation.

See Using the Image Manager on page 37 for additional instructions.

You can also add an image to a flash presentation by entering the **URL** of an image in the **URL** field of the Banner Edit Form. Then click **Save**. Your changes are saved and the web site displays your new flash presentation.

Note: by clicking **History** in the Banner Edit Form, you can view the history of editing the flash and access previous versions of the flash.

5.2.4 Editing an Existing Flash Image

Follow these steps to edit an existing Flash Image:

1. Click **Edit Flash**. The Flash Edit List opens.
2. Click **Edit** next to the image. The Banner Edit Form opens.
3. To change the image, click the **change image**. The Image Manager opens.
4. In the Image Manager, select an existing image or upload your own image and select it.
5. Enter a description for your image in the Description (alt) field. The description will display when a reader moves the mouse arrow over the image.
6. Click **Save**. The Banner Edit Form opens showing the image you selected.
7. You can change the sequence number for your image now by entering a number in the Seq no field.
8. Click **Save**. Your changes are saved and the web site displays your new flash presentation.

See Using the Image Manager on page 37 for additional instructions.

You can also change an image in a flash presentation by entering the **URL** of a different image in the **URL** field of the Banner Edit Form. Then click **Save**. Your changes are saved and the web site displays your new flash presentation.

Note: by clicking **History** in the Banner Edit Form, you can view the history of editing the flash image and access previous versions of the image.

5.2.5 Deleting a Flash Image

To delete a flash image, click **Edit Flash**. The Flash Edit List opens. Click **Delete** next to the image you want to delete. The OK to Delete This Item? a dialog box opens. Click **OK**. The image is deleted.

6 Using the Image Manager

You use the Image Manager when you edit your web site banner, edit flash presentation images, or add and edit images for content areas using the rich text editor. In those situations, the Image Manager opens for selecting images and uploading your own images.

Note: the Image Manager will display different options depending on the context in which it is opened. Image formatting options, such as image alignment, border, and space around the image are not available and not displayed in some cases. Also note that the images available in the Image Manager will vary, since different images are associated with different web pages and content areas.

An example of the Image Manager, displaying all formatting options, opened to add an image to a content area is shown on page 38.

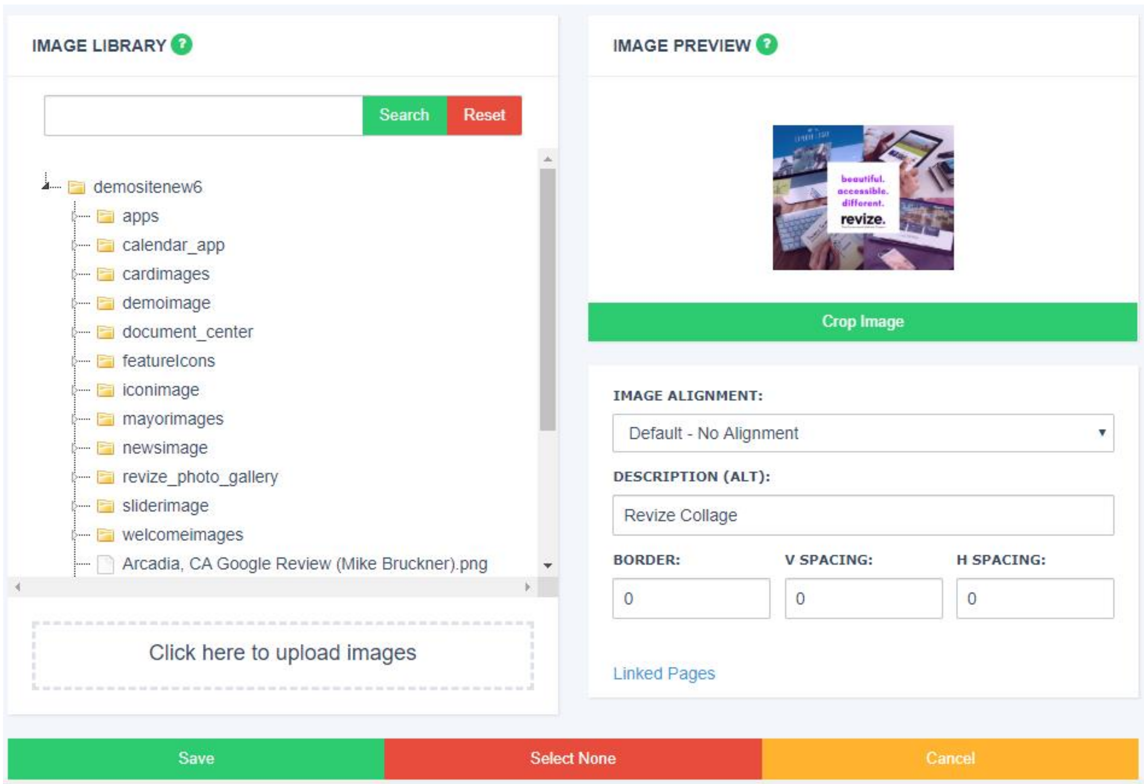
6.1 Selecting an Existing Image

To select an existing image in the Image Manager follow these steps:

1. Click the file name of the image in the column of files and folders. To open a folder to view its files, click the folder icon or name. A sample of the image you select appears in the field Currently Selected Image, and a descriptive name for the image appears in the Description field.

2. You can change the description now. The description will display when a reader moves the mouse arrow over the image.

3. Click **Save** to save the image to the edit form you are using.



6.2 Choosing Among Image Formatting Options

When you select an image by clicking its file name, a sample of the image is displayed under Currently Selected Image. You can now format the image using the formatting fields below it:

- Image Alignment—select from these alignment options:

  Default – No Alignment does not align the image. The image can be aligned after it is saved to the rich text editor.

  Left – (Text Wraps) aligns the image along the left margin of the page. Text wraps around the sides of the image.

Right – (Text Wraps) aligns the image along the right margin of the page. Text wraps around the sides of the image.

Text at Top places text above the image.

Text at Middle places text to the side of the image.

Text at Bottom places text below the image.

- Border—enter the width in pixels of the black border around the image. To omit the border, enter 0.
- Space Around Image—enter the horizontal space (along the left and right sides of the image) and vertical space (along the top and bottom of the image) around the image in pixels.
- Description (alt)—enter the description of the image. The description will display when a reader moves the mouse arrow over the image.

After selecting and formatting your image, click **Save** to save the image to the edit form you are using.

6.3 Uploading Your Own Images

You can upload your own images to the Image Manager by following these steps:

1. If you want to upload your image to an existing folder in the Image Manager, click the folder name to highlight it.
2. Click **Browse** under Click on Browse to Upload File. The File Upload dialog box opens showing the files and folders on your computer.
3. Click the file you want to upload.
4. Click **Open**. The file you selected is added to the files in the Image Manager.

Note: you cannot upload a folder to the Image Manager.

6.4 Creating a Folder in the Image Manager

To create a new folder in the Image Manager, follow these steps:

1. Click **Create New Folder**. The Create New Folder dialog box opens.
2. Enter the name of your new folder in the Folder Name field.
3. Click **OK**. The folder is added to the Image Manager.

Note: a folder name cannot contain spaces.

6.5 Deleting Files and Folders from the Image Manager

To delete a file or folder from the Image Manager, follow these steps:

1. Click the file or folder name to highlight it.
2. Click **Delete Above Selection.** The Delete selected image dialog box opens.
3. Click **OK**. The file or folder is deleted.

Note: deleting a file or folder may require additional steps depending on how the file or folder is being used. In that case, additional instructions are presented.

7 Finding and Editing Content Areas

Content areas on web pages contain text and images. The edit forms for content areas display the rich text editor for adding and editing content.

7.1 Finding Content Areas

Here are some typical content areas found on **Revize-enabled** pages and the buttons that open their edit forms:

- Highlight news panels contain text that is given special emphasis by the large colored rectangle in which it appears. Click **Edit News Links** to edit highlight news panels.

- News and information items are important items that are presented in lists. Click **New**, **Edit**, or **Del** to add, edit, or delete news and information items.

- Center areas are the main areas of pages that contain much content often with complex formatting. Click **Edit Center Area** to edit center areas.

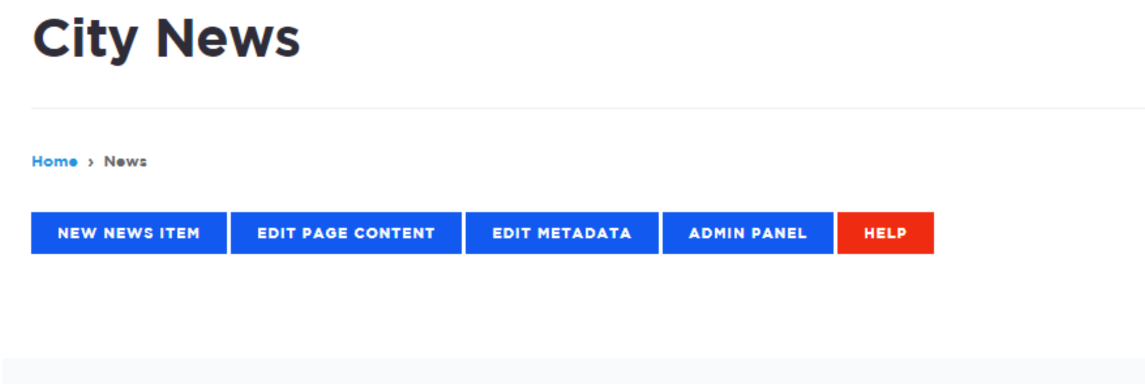
- Globals are small areas of text usually found in page footers and presented on all pages of a site. Click **Edit Globals** to edit globals.

Content areas are edited using the rich text editor. See Using the Rich Text Editor on page 49 for instructions.

7.2 Editing Highlight News Panels

An example of highlight news panels displayed on a city web page is shown on page 42.

To add or edit highlight news panels, click **Edit News Links**. The Highlight News Edit List opens:

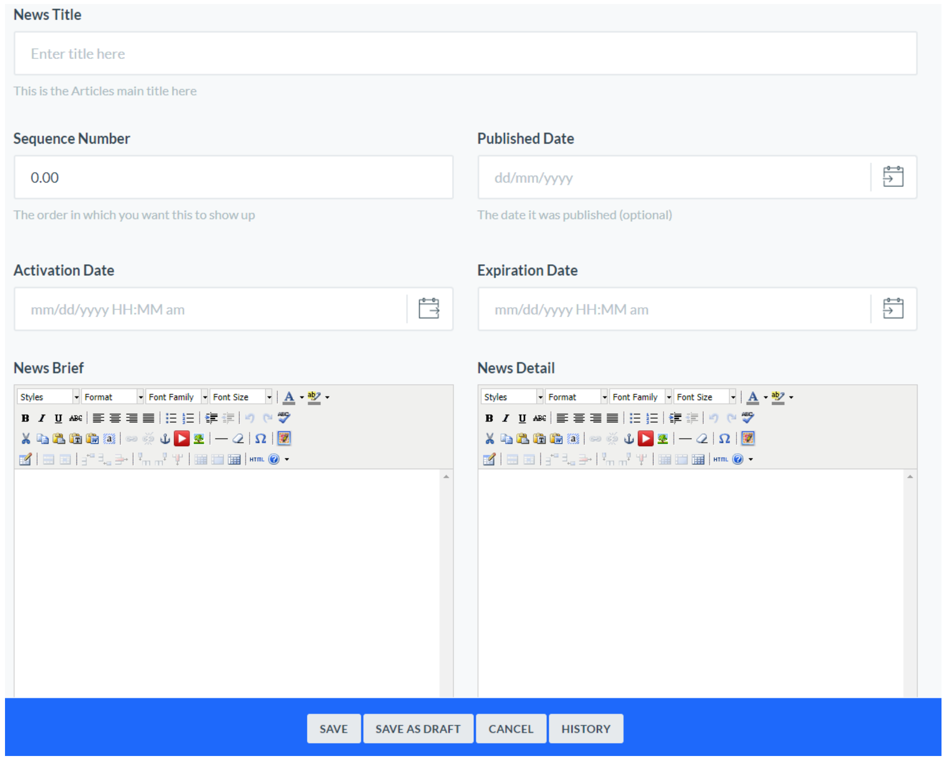


7.2.1 Adding a Highlight News Panel

To add a new highlight news panel, follow these steps:

1. Click **Edit News Links**. The Highlight News Edit List opens.

2. Click **New** in the Highlight News Edit List. The Highlight News Edit Form opens and displays the rich text editor.



3. Create your new highlight news panel using the rich text editor. See Using the Rich Text Editor on page 49 for instructions.

4. Enter a sequence number in the Seq. no field to determine the placement of your highlight news panel.

5. Enter the title for your panel in the Header field.

6. Click **Save**. Your new panel appears in the Highlight News Edit List.

7. Click **Exit**. Your new panel appears on its web page.

7.2.2 Editing a Highlight News Panel

To edit an existing highlight news panel, follow these steps:

1. Click **Edit News Links**. The Highlight News Edit List opens.

2. Click the **Edit** button for the Highlight News panel you want to edit. The Highlight News Edit Form opens and displays the item in the rich text editor.

3. Edit the highlight news item using the rich text editor. See Using the Rich Text Editor on page 49 for instructions. You can also edit the Seq. number and Header fields in the Highlight News Edit Form.

4. Click **Save**. The Highlight News Edit List appears.

5. Click **Exit**. Your panel appears on its web page.

7.2.3 Deleting a Highlight News Panel

To delete a highlight news panel, follow these steps:

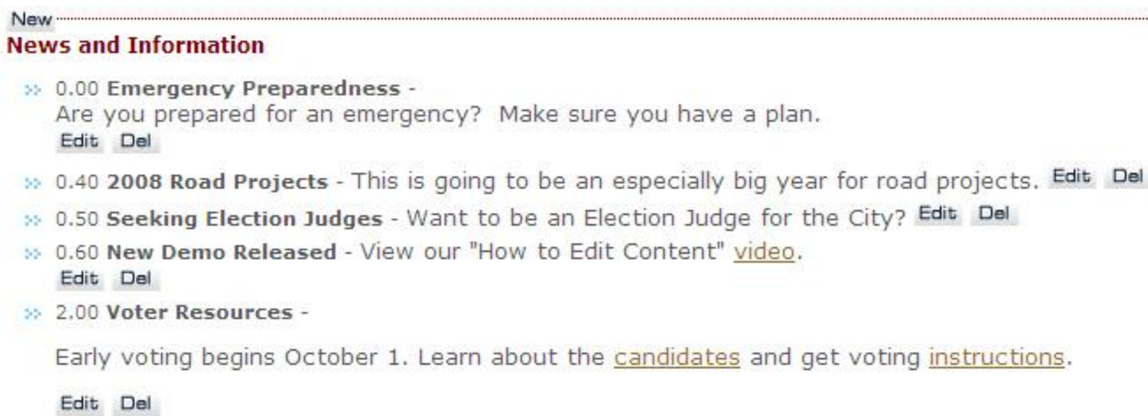
1. Click **Edit News Links**. The Highlight News Edit List opens.

2. Click the **Del** button for the Highlight News panel you want to delete. The OK to Delete This Item? a dialog box opens.

3. Click **OK** to delete the panel. The Highlight News Edit List opens showing your panel deleted.

7.3 Editing News and Information Items

Here is an example of a list of news and information items:



7.3.1 Adding a News and Information Item

To add a news and information item, follow these steps:

1. Click **New**. The News & Information Edit Form opens and displays the rich text editor.
2. Create your new news and information item using the rich text editor. See Using the Rich Text Editor on page 49 for instructions.
3. Enter a sequence number in the Seq. no field to determine the placement of your news and information item.
4. Enter the title for your item in the Header field.
5. Click **Save**. Your new news and information item appears on its web page.

7.3.2 Editing a News and Information Item

To edit an existing news and information item, follow these steps:

1. Click **Edit** next to a news item. The News & Information Edit Form opens and displays the rich text editor.

2. Edit your new news and information item using the rich text editor. See Using the Rich Text Editor on page 49 for instructions. You can also edit the Seq. number and Header fields in the News & Information Edit Form.

3. Click **Save**. Your changes are saved and the news and information item appears on its web page.

7.3.3 Deleting a News and Information Item

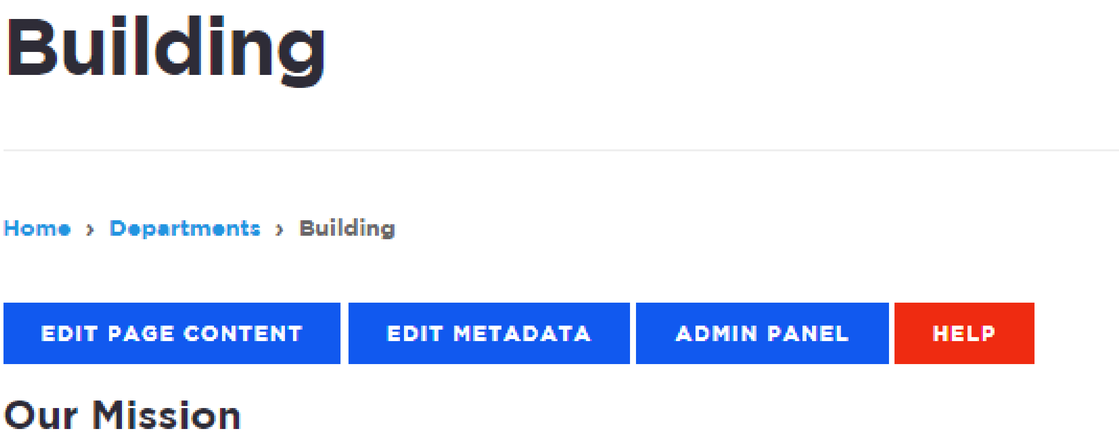
To delete a news and information item, follow these steps:

1. Click **Del** next to the item you want to delete. The OK to Delete This Item? a dialog box opens.

2. Click **OK** to delete the item. The web page opens with the item deleted.

7.4 Editing Center Areas

The center area of a web page is its main content area. Here is an example of a center area on a page that does not have any side links:



7.4.1 Adding a Center Area

To add a center area to a page, follow these steps:

1. Click **Edit Center Area**. An edit form opens displaying the rich text editor.

2. Create your center area using the rich text editor and complete the other fields in the edit form. See Using the Rich Text Editor on page 49 for instructions. For instructions on adding an **HTML** page title and **metadata** to the page, see Editing Metadata on page 85.

3. Enter a title for the center area in the Header field.

4. Enter an activation date and expiration date for the center area in the fields at the bottom of the edit form. Click the calendar icon to open a calendar for selecting a date.

5. Click **Save**. Your work is saved and the center area appears on its web page.

7.4.2 Editing a Center Area

To edit a center area, follow these steps:

1. Click **Edit Center Area**. An edit form opens displaying the rich text editor.

2. Edit the center area using the rich text editor. See Using the Rich Text Editor on page 49 for instructions. Edit the Header, Activation Date, and Expiration Date fields in the edit form. You can also edit the **HTML** page title and **metadata**. For instructions on adding **metadata** to the page, see Editing Metadata on page 85.

3. Click **Save**. Your changes are saved and the center area appears on its web page.

7.4.3 Deleting a Center Area

To delete a center area, follow these steps:

1. Click **Edit Center Area**. An edit form opens displaying the rich text editor.

2. Use the rich text editor to select all content. Then delete the content by pressing the Delete key on your computer keyboard. See Using the Rich Text Editor on page 49 for instructions.

3. Click **Save**. Your changes are saved and the web page opens without the center area.

7.5 Editing Globals

Globals are small areas of text usually found in page footers and presented on all pages of a site. In this example, © 2009 City of Atwater, MI is the only global:

To edit a global, follow these steps:

1. Click **Edit Globals**. The Global Edit Form opens displaying the rich text editor.

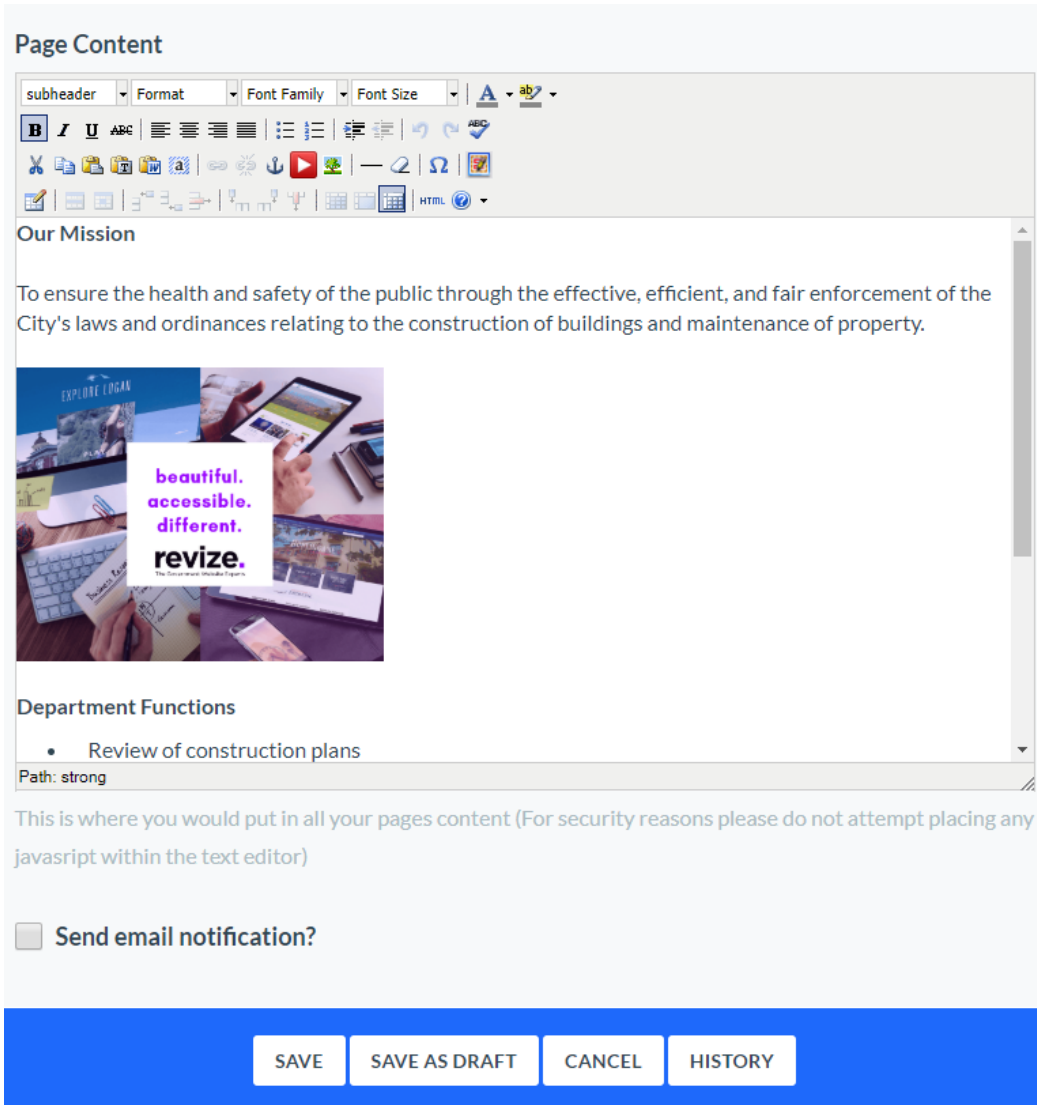
2. Edit the global using the rich text editor. See Using the Rich Text Editor below for instructions.

3. Click **Save**. Your changes are saved and the web page re-opens.

8 Using the Rich Text Editor

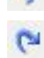
The rich text editor allows you to create content by inserting and formatting text and images. Edit forms for adding, editing, and deleting content display the rich text editor. The rich text editor shown on page 50 is from a center area edit form and displays the center area content ready to be edited.

The rich text editor operates within your web browser and functions much like a word processor.



8.1 Undoing, Redoing and Saving Drafts

Keep these tips in mind when using the rich text editor. They will help you correct formatting errors and avoid losing your work.

- Clicking **Cancel** at any time will close the edit form and rich text editor, and any changes or mistakes you have made will not be saved.
- Clicking  (**Undo**) will undo any change you have made. Clicking  (**Redo**) will redo a change that you have just undone.

- To save your work as a draft at any time, click **Save As Draft**. To access a draft later to re-use your work, click **History**.

8.2 Formatting Text

After you enter text into the rich text editor, you can format it using a variety of tools. You can also add special characters to your text, add horizontal rules, and spell check your work.

Note: some of the formatting functions described below can also be accessed by right-clicking within the editing field and choosing from the options presented.

8.2.1 Using Basic Formatting Tools

After you enter or paste the text into the rich text editor, highlight the text you want to format. You can then apply these kinds of basic formatting:

- Change the font family—select a font from the Font-family drop-down menu.
- Change the font size—select a font size from the Font size drop-down menu.
- Change the font color—click  and select a color.
- Highlight text in color—click  and select a color.
- Change the font to bold—click .
- Change the font to italic—click .
- Draw a strike line through the text—click .
- Left aligns text—click .
- Center text—click .

- Right align text—click .
- Justify text—click .
- Change paragraphs into a bulleted list—click .
- Change paragraphs into a numbered list—click .
- Indent the paragraph—click .
- Reduce a paragraph indent—click .
- Select all content in the rich text editor—click .
- Add a horizontal rule after text—click .

8.2.2 Formatting Text with Styles and Formats

A **style** is a set of formatting commands that can be applied to a paragraph with one click. Similarly, a **format** is also a set of formatting commands that can be applied to a paragraph with one click.

Applying a **style** to a paragraph only changes the font family and font size within the paragraph. Applying a **format** to a paragraph changes font size but also changes paragraph indenting and the space above and below the paragraph.

To apply a **style** or **format**, follow these steps:

1. Place your cursor within the paragraph you want to format.
2. Open the Styles drop-down menu or the Format drop-down menu.
3. Click the **style** or **format** you want to apply to the paragraph. Your paragraph is reformatted.

8.2.3 Copying, Cutting, and Pasting Text

You can copy, cut, and paste the text into the rich text editor with these tools:

- Copy highlighted text—click .
- Cut highlighted text—click .
- Paste text—click .
- Paste text without formatting—click .
- Remove formatting from the highlighted text—click .

Note: when you copy, cut, or paste text with the rich text editor, you may need to use the shortcut keys on your computer for those actions instead of the rich text editor commands. These are the shortcuts used by the Microsoft Windows operating system for copying, cutting, and pasting:

Control key + c copies selected text

Control key + x cuts selected text.

Control key + v pastes copied text at the cursor location

8.2.4 Adding Special Symbols and Characters

You can add special characters and symbols, such as © or a nonbreaking space, to text by following these steps:

1. Place your cursor where you want the special character.
2. Click . The Select custom character dialog box opens.
3. Click the character you want to insert. The character is inserted.

8.2.5 Using the Spelling Checker

You can check the spelling of your text at any time by clicking . The spelling checker dialog box opens showing misspellings and presenting options for correcting or ignoring them.

If you have added or changed text in the rich text editor, the Do you wish to spell check? a dialog box opens automatically when you click **Save** to save your work. Click **OK** to open the spelling checker dialog box. Click **Cancel** to skip spell checking.

8.3 Pasting Text Copied from a Microsoft Word Document

To paste text copied from a Microsoft Word document, preserving some of its original formattings, follow these steps:

1. Click . The Paste from Word dialog box opens.
2. Press your computer keyboard's Control key + v to paste the Word text into the Paste from Word dialog box.
3. Click **Insert**. The text is pasted into the rich text editor.

8.4 Adding Hyperlinks and Anchors to Text

Using the rich text editor, you can add hyperlinks and **anchors** to your text that take readers to other pages or other places within the same text.

8.4.1 Uses of Hyperlinks and Anchors

Hyperlinks are areas of text with special **HTML** coding. They are often displayed as underlined, colored text. Typically, when a reader clicks a hyperlink, a new web page opens or another area of the same text is displayed.

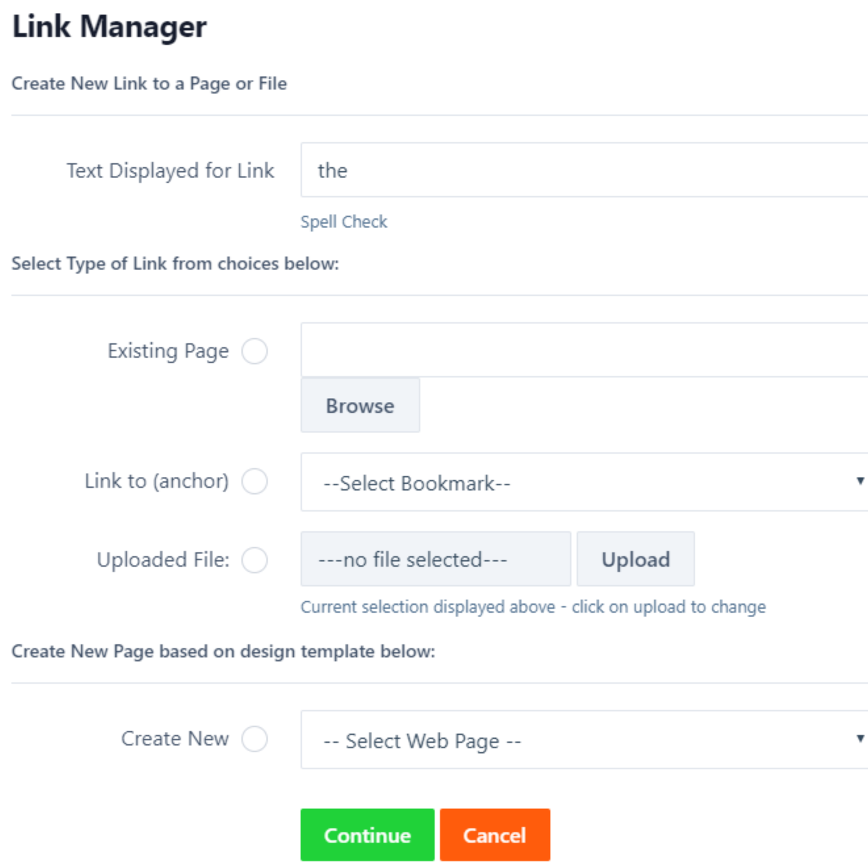
A simple hyperlink opens a new web page. For a hyperlink to display another area of the same text, the other area must be coded with an **HTML anchor**, and the hyperlink coding must include the **anchor** name. (**Anchors** can also be used for hyperlinking to a specific place on another page.)

The rich text editor makes the insertion of hyperlinks and **anchors** simple tasks.

8.4.2 Adding a Hyperlink to Text

To make a word or phrase a hyperlink that opens another page or an area of the same text, follow these steps:

1. Highlight the text to become a hyperlink.
2. Click . The Link Manager dialog box opens (see page 56).
3. Do not change the text in the Text Displayed for Link field. This is the text to become a hyperlink.
4. Below Select Type of Link from choices below, select one of the following:
    - Select **Existing Page** if you want the hyperlink to open an existing web page. Enter the **URL** of the page in the field following Existing Page.
    - Select **Link to Bookmark (anchor)** if you want your hyperlink to link to a spot in the same text. Open the drop-down menu and select an **anchor**. See Adding an Anchor on page 59.



- Select **Uploaded File** if you want the hyperlink to open a file, such as a **PDF** document. Click the **upload file** to select a file or upload a new file to the system. The File Manager dialog box opens. See Using the File Manager when Creating Links on page 29 for instructions on selecting a file for your hyperlink.

- Select **Create New Revize Web Page** if you want the hyperlink to open a new web page.

  Select a template for the new web page by opening the drop-down menu below Select Create New Revize Web Page.

  You may enter an **HTML** file name for the new page in the field following Filename for HTML

Page if you want to change the name automatically chosen. The file name never appears on the web page.

If you want the new page to be a **section home page**, select **Yes** following Should page start a new department or **section**. Otherwise, select **No**. For an explanation of **sections** and pages, see Web Site Sections and Pages on page 87 or move your mouse pointer over in the Link Manager.

If you want your new page or document to open in a new browser window, select **Yes** following Open Page in a New Window. To have the page or document open in the same browser window, select **No**.

5. After making your entries and selections in the Link Manager, click **Continue**. Your hyperlink is created and shown in the rich text editor.

6. If your hyperlink opens a new page, you can add content to the page by clicking **Save** to close the rich text editor. Your web page opens displaying the hyperlink to your new page. Click the hyperlink to open and edit your new page.

8.4.3 Editing a Hyperlink

To edit existing hyperlinks, follow these steps:

1. Highlight the hyperlink you want to edit.
2. Click . The Link Manager dialog box opens for editing the hyperlink. You can now:
    - change the hyperlink to link to a new or existing page

- change the hyperlink to link to an **anchor** on the same page (see Adding an Anchor on page 59)
- change the hyperlink to link to an uploaded file
- change the file name of the page for the link
- change whether the page opens in a new window or not.

3. After making your changes in the Link Manager, click **Continue**. Your hyperlink is edited and shown in the rich text editor.
4. If your hyperlink opens a new page, you can add content to the page by clicking **Save** to close the rich text editor. Your web page opens displaying the hyperlink to your new page. Click the hyperlink to open and edit your new page.

8.4.4 Deleting a Hyperlink

To delete a hyperlink but not the hyperlink text, follow these steps:

1. Highlight the hyperlink text.
2. Click . The hyperlink is removed, and the text remains.

To delete a hyperlink and the hyperlink text, follow these steps:

1. Highlight the hyperlink text.
2. Push Delete on your computer keyboard. Both the hyperlink and the text are removed.

8.4.5 Adding an Anchor to Text

To add an **anchor** to text, follow these steps:

1. Highlight the text to be marked with the **anchor**.
2. Click . The Insert/edit anchor dialog box opens.
3. Enter a name for your **anchor** in the field following Anchor's name.
4. Click **Insert**. The **anchor** is created and its location is shown by preceding the marked text.

8.4.6 Editing an Anchor

You can change the name of an **anchor** by following these steps:

1. Highlight the **anchor** marker you want to edit.
2. Click . The Insert/edit anchor dialog box opens.
3. Change the name of your **anchor** in the field following Anchor's name.
4. Click **Update**. The **anchor** name is changed.

8.4.7 Deleting an Anchor

To delete an **anchor**, follow these steps:

1. Highlight the **anchor** marker .
2. Press the Delete button on your computer keyboard. The **anchor** is deleted.

8.5 Adding and Formatting Images

When you add an image to your text using the rich text editor, you can format the image to determine its size, its border, the space around the image, its position, and the way text is positioned around the image. You can format an image both in the Image Manager and also in the rich text editor.

8.5.1 Adding an Image to Text

To add an image to your text, follow these steps:

1. In the rich text editor, place your cursor where you want the image to be placed.
2. Click . The Image Manager opens.
3. Select an image in the Image Manager or upload and select your own image.
4. Format your image in the Image Manager by completing the formatting fields. See Formatting an Image from the Rich Text Editor below.
5. Click **Save**. Your edit form re-opens showing your new image in the rich text manager.

For instructions on using the Image Manager see Using the Image Manager on page 37.

8.5.2 Formatting an Image from the Rich Text Editor

Follow these steps to format an image in the rich text editor:

1. Click the image you want to format.
2. Click . The Image Manager opens with formatting options shown below the image (see page 61).

3. Here are the options you have for formatting your image:

    - Image Alignment—open this drop-down menu and click an option for aligning your image:

      Default–No Alignment places the image inline with text.

      Left–(Text Wraps) places the image along the page's left margin and the text along the image's right side.

      Right–(Text Wraps) places the image along the page's right margin and the text along the image's left side.

      Text at Top starts the text at the top of and alongside the image.

      Text at Middle starts the text in the middle of and alongside the image.

      Text at Bottom starts the text at the bottom of and alongside the image.

- Border—enter the width in pixels of the black border around the image. To omit the border, enter 0.

- Space Around Image—enter the Horizontal space (the space along the left and right sides of the image) and Vertical space (space above and below the image) in pixels.

- Description (alt)—the image description you enter here appears when a reader moves the mouse pointer over the image.

4. After making your formatting entries and selections in the Image Manager, click **Save**. Your image is formatted and shown in the rich text editor.

8.5.3 Deleting an Image

To delete an image in the rich text editor, click the image. Then push the Delete key on your computer keyboard. The image is deleted from the rich text editor.

8.6 Adding and Editing Tables

Tables have two common uses on web pages. You can use a table to display a tabular list, such as a list of names, addresses, and phone numbers with three columns and multiple rows. However, you can also use a table, often with invisible lines, to position text and images on a web page by placing content within the table's cells, or boxes.

An example of text and an image positioned by a table is shown below (see page 63). This table has four rows and two columns. The cells in the top row are merged together as one as are the cells in the third row, which contains an image.

Atwater Spotlight

History at Summit Research Park

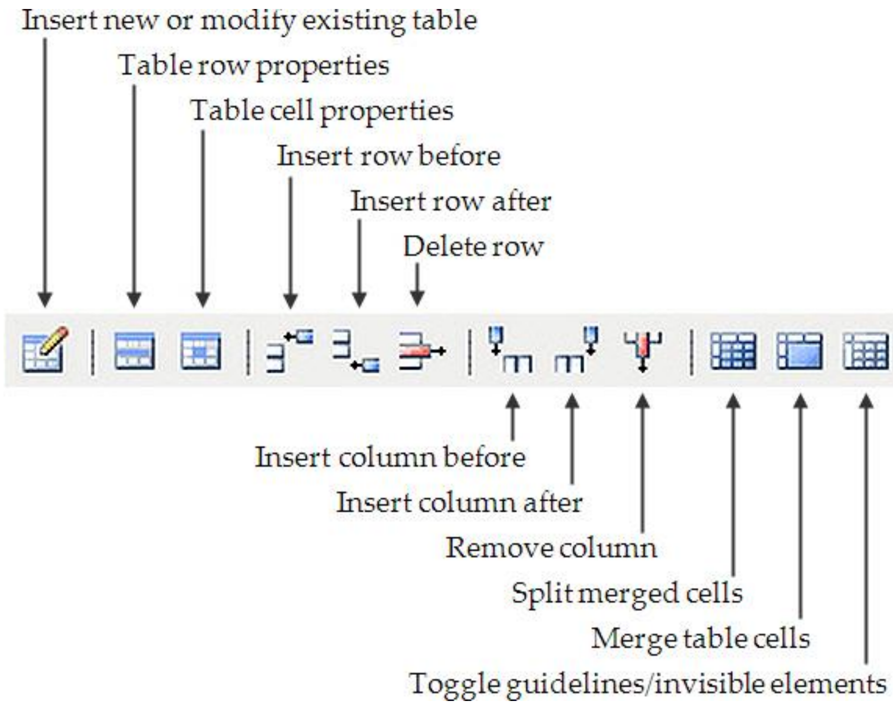
In 1933 the United States government commissioned the Sunnyvale Naval Air Station to serve as home base for the Navy dirigible U.S.S. Macon. The Ames Aeronautical Laboratory was established in 1939 by Congress adjacent to the naval station as the west coast site of the National Advisory Committee on Aeronautics (NACA). In 1945 the Sunnyvale airfield was renamed Moffett Field, after Admiral Moffett lost his life in the 1935 crash of the U.S.S. Macon.

Following the closure of Moffett Field as a military base in 1994, NASA Ames acquired stewardship for the navy property. NASA Ames, with the nearby communities of Mountain View and Sunnyvale, developed an award winning re-use plan to transform part of the former Naval Air Station into a world class R & D center dedicated to serving the goals of the nation's space program.

In 1958 the Ames Aeronautical Laboratory became a NASA field center when Congress created NASA with the National Aeronautics and Space Act. NASA Ames Research Center, one of the most active R & D centers in the United States, grew to occupy 500 acres adjacent to the Naval Air Station at Moffett Field.

In 2002 NASA Research Park began collaborative partnerships with academia, industry and non-profits to stimulate innovation and education in science and research disciplines critical to space exploration. NASA Ames strategic partnering in key areas, including astrobiology, information technology, biotechnology and nanotechnology, will create a dynamic, integrated research community that provides R&D leadership into the 21st century.

The rich text editor displays these tools for creating tables:

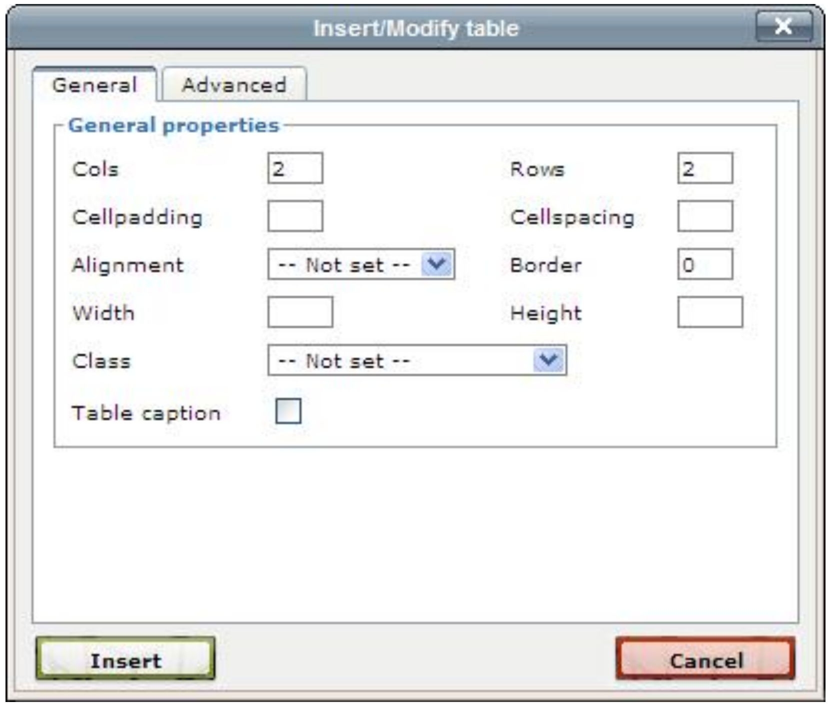


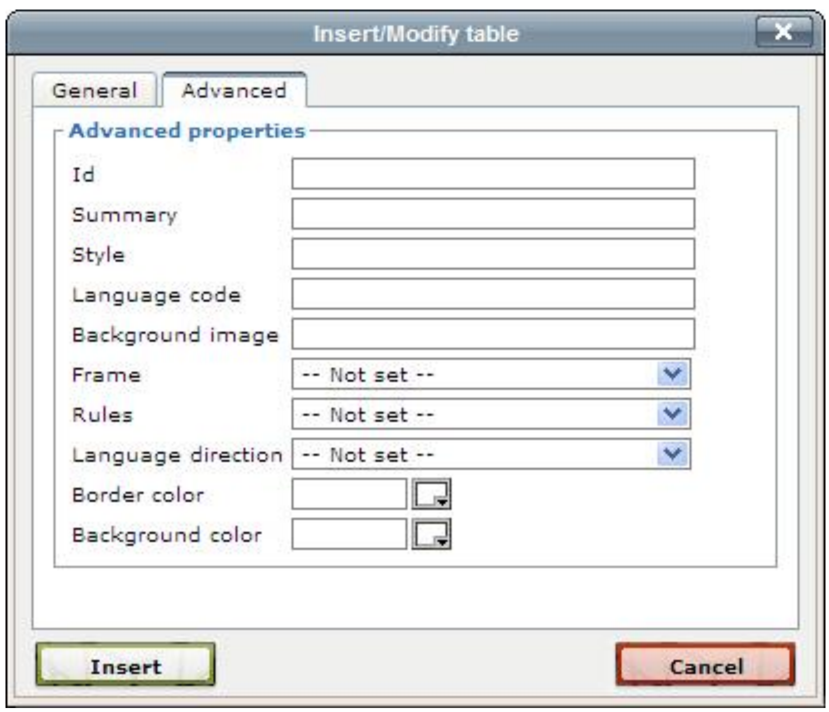
Note: many of these tools and other editing tools are also displayed when you right-click areas of the table you are editing in the rich text editor.

8.6.1 Adding a Table

To add a table in the rich text editor, follow these steps:

1. Place your cursor where you want the table.
2. Click . The Insert/Modify table dialog box opens (see page 65).





3. Complete the fields and selections in the General properties tab (or accept the default values):

    - Cols—enter the number of columns in the table.

- Rows—enter the number of rows in the table.
- Cellpadding—enter the width of the space around cell contents in pixels.
- Cellspacing—enter the space between cells in pixels.
- Alignment—from this drop-down menu select **Center**, **Left**, or **Right** to place the table in the center of the page, along the left margin of the page, or along the right margin of the page, respectively.
- Border—enter the width of the border around the table in pixels. To omit the border, enter 0.
- Width—enter the width of the table in pixels.
- Height—enter the height of the table in pixels.
- Class—select **content** in most cases. **(value)** is used to select a table style from a **CSS** style sheet. The **(value)** option is not described in this guide.
- Table caption—select to add a row to the top of the table for a caption.

4. Complete the fields and selections in the Advanced properties tab (or accept the default values):
   - Id—this field is used for advanced page design and is not described in this guide.
   - Summary—this field is used for advanced page design and is not described in this guide.
   - Style—this field is used for advanced page design and is not described in this guide.

- Language code—this field is used for advanced page design and is not described in this guide.
- Background image—enter the **URL** of an image. The image appears in the spaces between table cells.
- Frame—this field is used for advanced page design and is not described in this guide.
- Rules—this field is used for advanced page design and is not described in this guide.
- Language direction—selecting **Left to right** or **Right to left** reverses the order of cells within each row.
- Border color—enter the **HTML** code for the border color. You can also click and select a color in the Select a color dialog box. Then click **Apply**.
- Background color—enter the **HTML** code for the background color. You can also click and select a color in the Select a color dialog box. Then click **Apply**. The background color appears in the spaces between table cells.

5. After completing the fields in the General and Advanced properties tabs, click **Insert**. Your table appears in the rich text editor.
6. Click the table and eight small boxes appear around its border. You can click and drag any box to resize the table.

   Note: clicking makes the lines of a table visible or invisible within the rich text editor.

8.6.2 Editing Properties of an Existing Table

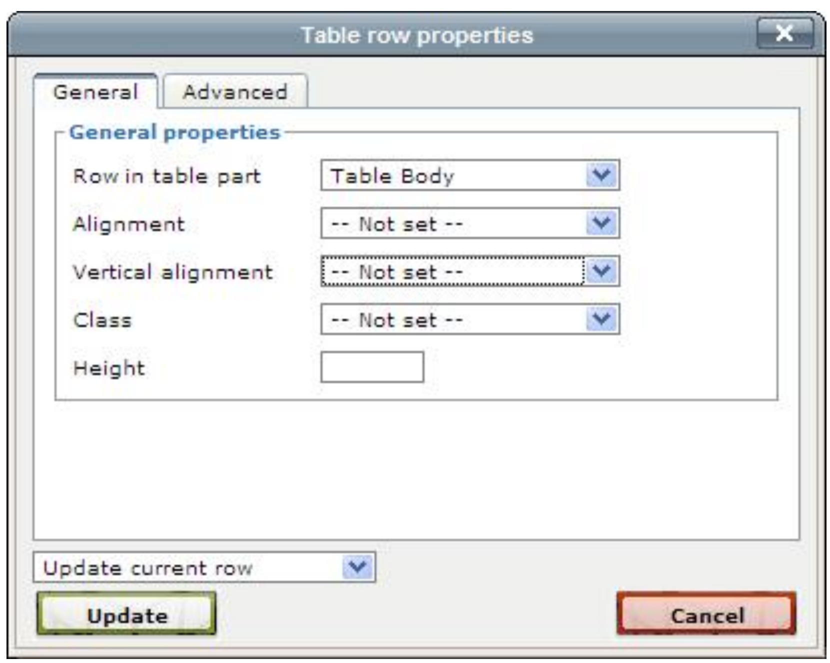
To edit the properties of an existing table, follow these steps:

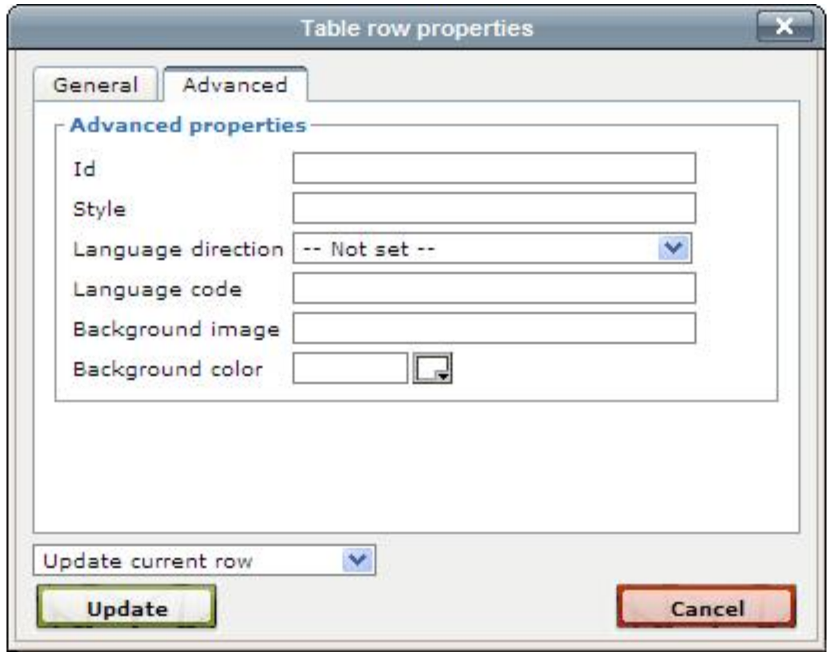
1. Select the table by clicking it.
2. Click . The Insert/Modify Table dialog box opens.
3. Edit your selections in the Insert/Modify Table dialog box.
4. Click **Update**. Your table is updated and shown in the rich text editor.

8.6.3 Editing Table Row Properties

To edit the properties of a table row, follow these steps:

1. Highlight the row or rows you want to edit.
2. Click . The Table row properties dialog box opens:





3. Complete the fields and selections in the General properties tab (or accept the default values):

    - Row in table part—from this drop-down menu select **Table Head**, **Table Body**, or **Table Foot** to indicate whether the selected row is a header row, body row, or footer row, respectively.

    - Alignment—from this drop-down menu select **Center**, **Left**, or **Right** to place cell contents in the centers of cells, along the left margins of cells, or along the right margins of cells, respectively.

    - Vertical alignment—from this drop-down menu select **Top**, **Center**, or **Bottom** to place cell contents at the tops, centers, or bottoms of cells, respectively.

    - Class—select **content** in most cases. **(value)** is used to select a row style from a **CSS** style sheet. The **(value)** option is not described in this guide.

- Height—enter the height of each of the selected rows in pixels.

4. Complete the fields and selections in the Advanced properties tab (or accept the default values):

   - Id—this field is used for advanced page design and is not described in this guide.
   - Style—this field is used for advanced page design and is not described in this guide.
   - Language direction—selecting **Left to right** or **Right to left** reverses the order of cells within the selected row or rows.
   - Language code—this field is used for advanced page design and is not described in this guide.
   - Background image—enter the **URL** of an image. The image appears within the cells in the selected rows.
   - Background color—enter the **HTML** code for the background color. You can also click  and select a color in the Select a color dialog box. Then click **Apply**. The background color appears within the cells in the selected rows.
   - Update the current row—open this drop-down menu and select which rows you want your changes to apply to.

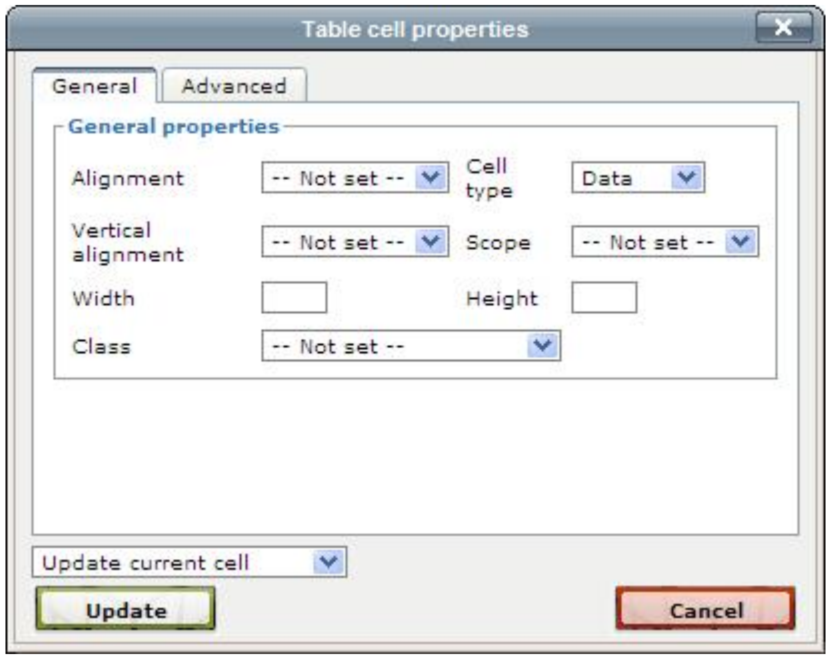
5. After completing the fields in the General and Advanced properties tabs, click **Update**. Your table is updated and appears in the rich text editor.

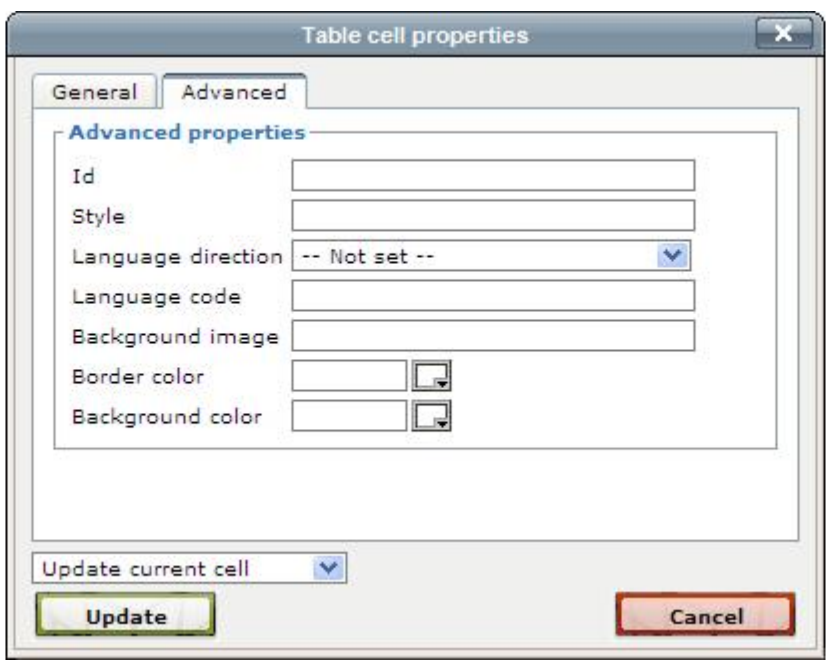
8.6.4 Editing Table Cell Properties

To edit the properties of a table cell, follow these steps:

1. Highlight the cell or cells you want to edit.

2. Click . The Table cell properties dialog box opens:





3. Complete the fields and selections in the General properties tab (or accept the default values):

- Alignment—from this drop-down menu select **Center**, **Left**, or **Right** to place cell contents in the centers of cells, along the left margins of cells, or along the right margins of cells, respectively.

- Vertical alignment—from this drop-down menu select **Top**, **Center**, or **Bottom** to place cell contents at the tops, centers, or bottoms of cells, respectively.

- Cell type—from this drop-down menu, select **Data** if the cell is in the body of the table. Select **Header** if the cell is in the table's header row.

- Scope—select **Column**, **Row**, **Row Group**, or **Column Group** to apply your changes to all cells in a selected column, row, row group, or column group, respectively.

- Width—enter the width of your selected cells in pixels.

- Height—enter the height of your selected cells in pixels.

- Class—select **content** in most cases. **(value)** is used to select a row style from a **CSS** style sheet. The **(value)** option is not described in this guide.

4. Complete the fields and selections in the Advanced properties tab (or accept the default values):

   - Id—this field is used for advanced page design and is not described in this guide.

   - Style—this field is used for advanced page design and is not described in this guide.

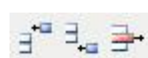
   - Language direction—selecting **Left to right** or **Right to left** reverses the order of cells within a group of cells in a row.

- Language code—this field is used for advanced page design and is not described in this guide.
- Background image—enter the **URL** of an image. The image appears within the selected cells.
- Background color—enter the **HTML** code for the background color. You can also click  and select a color in the Select a color dialog box. Then click **Apply**. The background color appears within the selected cells.
- Update the current cell—open the drop-down menu and select which cells you want your changes to apply to.

5. After completing the fields in the General and Advanced properties tabs, click **Update**. Your table is updated and appears in the rich text editor.

8.6.5 Adding and Deleting Table Rows

To add or delete rows from an existing table, follow these steps:

1. Highlight the row you want to edit
2. Click one of these icons  to insert a row before the selected row, insert a row after the selected row, or delete the selected row, respectively. Your row is added or deleted.

8.6.6 Adding and Deleting Table Columns

To add or delete columns from an existing table, follow these steps:

1. Highlight the column you want to edit.
2. Click one of these icons  to insert a column before the selected column, insert a column after the selected column, or delete the selected column, respectively. Your column is added or deleted.

8.6.7 Merging and Splitting Table Cells

To merge two or more table cells into one cell, follow these steps:

1. Highlight the cells you want to merge.
2. Click . The cells are merged.

To split two or more tables cells that have been merged, follow these steps.

1. Highlight the cell you want to split.
2. Click . The cell is split.

8.6.8 Deleting a Table

To delete an entire table, follow these steps:

1. Highlight the entire table.
2. Right-click the table. Options for editing the table are displayed.
3. Click the **Delete table**. The table is deleted.

You can also delete a table by clicking the table and pushing the Delete key on your computer keyboard.

8.7 Editing HTML Code

You can also format text by editing the **HTML** formatting code of the content shown in the rich text editor. However, you must have a basic knowledge of **HTML** to change formatting by editing **HTML** code. Follow these steps to edit **HTML** source code:

1. Click HTML. The HTML Source Editor opens.
2. Edit the **HTML** markup tags around the text in the HTML Source Editor.
3. Click **Update**. The **HTML** code is edited and your changes are shown in the rich text editor.

9 Creating Forms and Fields

You can collect information from readers by putting forms and fields that readers fill out onto a web page. You use the rich text editor to insert the forms and fields into the center area of your page.

9.1 Uses of Forms and Fields

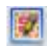
Forms contain fields that readers fill out and the instructions for filling in the fields. After a reader fills out a form, for example, to submit questions or comments, he or she clicks a **Submit** button and the information entered into the form is emailed to an address associated with the form.

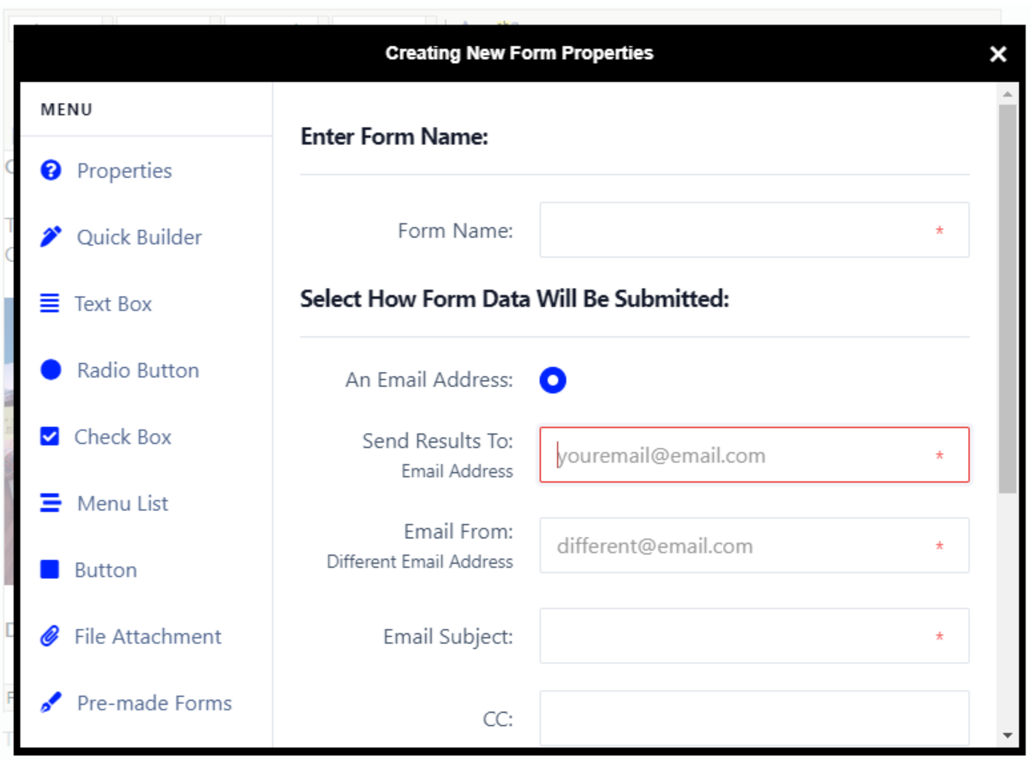
A form can also consist of simple text areas, radio buttons, checkboxes, or drop-down menus that readers use to enter text, choose among options, or make selections. Those entries and choices are also emailed to an address associated with the form.

9.2 Setting Form Properties

Follow these steps to set the basic properties required for creating any form or field:

1. Working within the rich text editor, place your cursor where you want to insert the form.

2. Click . The Creating New Form Properties dialog box opens:



In this example, the required fields in the dialog box are filled in. The Creating New Form Properties dialog box contains these fields:

- Send Results To—enter the email address to which readers' responses are sent.
- Email From—enter the email address from which readers' responses are sent.

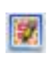
- Email Subject—enter the subject line for results emails.
- CC—enter an email address to which copies of readers' responses are sent.
- Success URL—enter the **URL** of the page to display when a reader successfully submits a response. If this field is left blank, a simple default page is displayed.
- Failure URL—enter the **URL** of the page to display when a reader unsuccessfully submits a response. If this field is left blank, a simple default page is displayed.

3. After completing the fields in the Creating New Form Properties dialog box, you can select the **Quick Form Builder** or one of the form tools listed in the left of the dialog box to create a new form. You can also click **OK** to return to the rich text editor where you will see an empty form field area outlined in red.

9.3 Using the Quick Form Builder

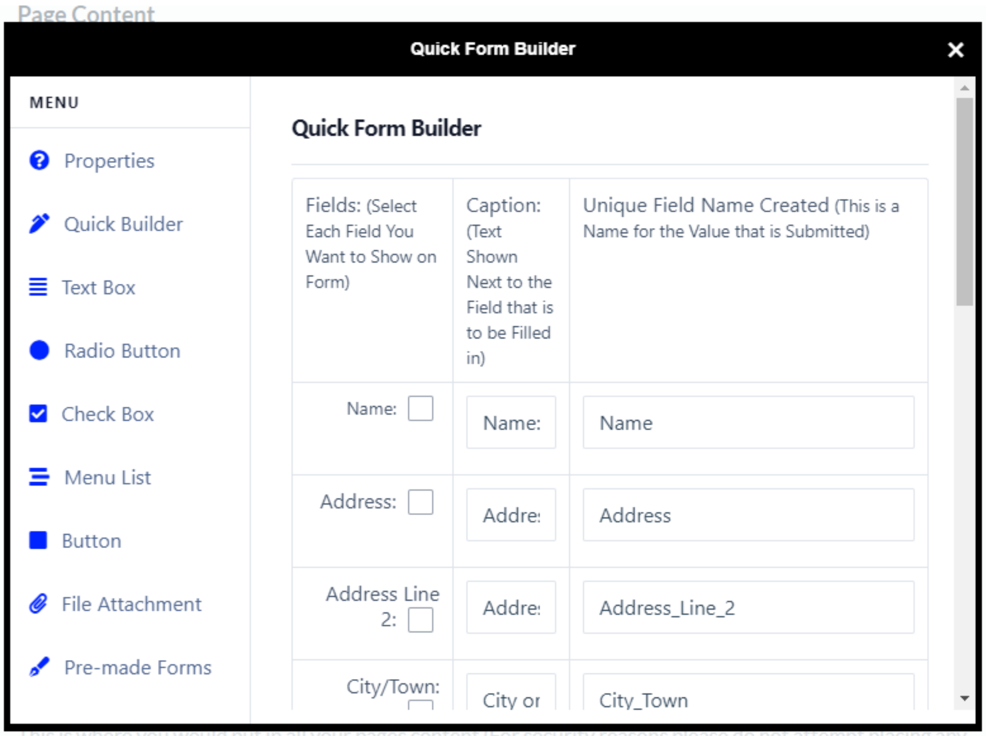
The Quick Form Builder will build a basic comments form that can contain any of many useful elements (see page 78).

To use the Quick Form Builder, follow these steps:

1. Click  to open the Creating New Form Properties dialog box and complete the fields in the box. See Setting Form Properties on page 76.

   If you have already created an empty form field area in the rich text editor, open the Creating New Form Properties dialog box by clicking within the empty form field area and then clicking . The Creating New Text Field dialog box opens.

2. Click **Quick Form Builder**. The Quick Form Builder dialog box opens (see page 78).



3. Complete the selections and fields in the Quick Form Builder:

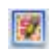
   - Fields—select the fields you want to be included in the form.
   - Caption—enter a caption to display for each field.
   - Unique Field Name Created—enter a different name for each field. The names will label the responses readers make when their responses are reported by email.
   - **Add Table**—select **Add Table** in most cases to align your fields neatly on the web page.

4. Click **OK**. Your form appears in the rich text editor.

9.4 Adding Other Form Elements

Using the form tools shown in the Forms and Fields dialog box, you can custom design simple forms by adding text areas, radio buttons, checkboxes, or drop-down menus. An example is shown on page **Error! Bookmark not defined.**.

You can access the form tools in several ways:

- Form tools are displayed when you create form properties in the Creating New Form Properties dialog box.
- You can also access form tools by right-clicking within the rich text editor and from the options displayed selecting **Insert form**. The Forms and Fields dialog box opens with the form tools listed on the left side of the box.
- If you have already created an empty form field area in the rich text editor, open the Creating New Form Properties dialog box by clicking within the empty form field area and then clicking . The Creating New Text Field dialog box opens with the form tools listed on the left side of the box.

Note: you may want to place several form fields within one form field area by entering a carriage return. To enter a carriage return within a form field area, hold down the Shift key and press Enter on your computer keyboard. Otherwise, pushing only Enter will create a new form field area that will require its own Reset and Submit buttons. See Creating Reset and Submit Buttons on page 81.

9.4.1 Adding a Text Area

Follow these steps to add a text area:

1. Place your cursor where you want the text area.
2. Right-click the spot and from the options displayed, click **Insert form**. The Forms and Fields dialog box opens.
3. In the Forms and Fields dialog box, click **Text Area**. The Creating New Text Field dialog box opens.

4. Complete the fields and selections in the Creating New Text Field dialog box.

5. Click **OK**. Your text area is added and shown in the rich text editor.

9.4.2 Adding a Radio Button

Follow these steps to add a radio button:

1. Place your cursor where you want the radio button.

2. Right-click the spot and from the options displayed, click **Insert form**. The Forms and Fields dialog box opens.

3. In the Forms and Fields dialog box, click **Radio Button**. The Creating New Radio Button dialog box opens.

4. Complete the fields and selections in the Creating New Radio Button dialog box.

5. Click **OK**. Your radio button is added and shown in the rich text editor.

9.4.3 Adding a Checkbox

Follow these steps to add a checkbox:

1. Place your cursor where you want the checkbox.

2. Right-click the spot and from the options displayed, click **Insert form**. The Forms and Fields dialog box opens.

3. In the Forms and Fields dialog box, click **Checkbox**. The Creating New Checkbox dialog box opens.

4. Complete the fields and selections in the Creating New Checkbox dialog box.

5. Click **OK**. Your checkbox is added and shown in the rich text editor.

9.4.4 Adding a List Menu

Follow these steps to add a list menu:

1. Place your cursor where you want the list menu.
2. Right-click the spot and from the options displayed, click **Insert form**. The Forms and Fields dialog box opens.
3. In the Forms and Fields dialog box, click **List Menu**. The Creating New List Menu dialog box opens.
4. Complete the fields and selections in the Creating New List Menu dialog box.
5. Click **OK**. Your list menu is added and shown in the rich text editor.

9.4.5 Creating Reset and Submit Buttons

Following a form field or set of fields within a single form field area, you must add a Submit button, and you may also add a Reset button. A reader clicks the Submit button to send his or her responses to the email address associated with the form field area. Submit and Reset buttons operate on all the form fields within the form field area in which they are located.

To add a Submit or Reset button, follow these steps:

1. Place your cursor where you want the button.
2. Right-click the spot and from the options displayed, click **Insert form**. The Forms and Fields dialog box opens.

3. In the Forms and Fields dialog box, click **Button**. The Creating New Button dialog box opens.

4. Complete the fields and selections in the Creating New Button dialog box.

5. Click **OK**. Your button is added and shown in the rich text editor.

9.5 Editing and Deleting Form Fields

To edit or delete a form field, follow these steps:

1. Right-click the form field you want to edit or delete. A list of editing options is displayed.

2. Click the appropriate form field option: **Update form field**, **Update form properties** or **Delete form and fields**.

10 Creating and Editing Calendar Events

Revise-enabled web pages may display event calendars that readers use to learn about activities or information associated with specific dates. An example of an event calendar is shown on page 83 (clicking the red "S" opens an event signup form).

10.1 Creating a Calendar Event

To add a calendar event to an event calendar, follow these steps:

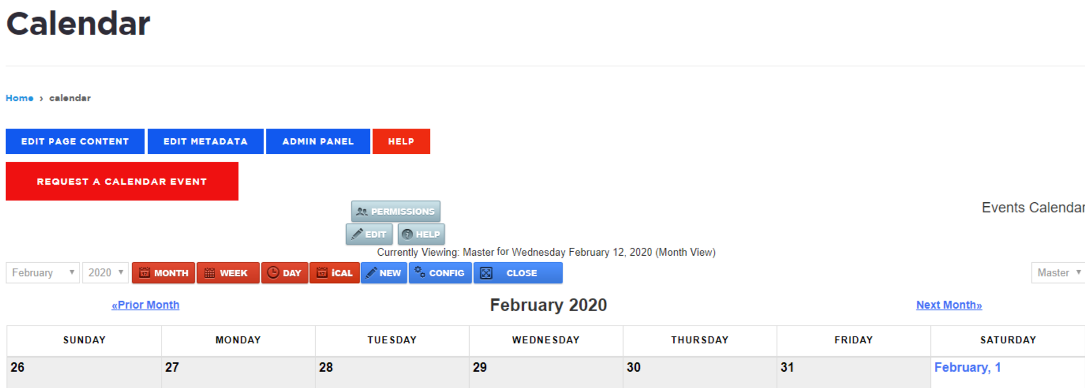
1. Click **Update Calendar**. The calendar application opens.

2. From the drop-down menu 

, select the calendar you want your event listed on.

3. Click 

. The New Event Form opens.



4. Complete the fields and selections in the New Event Form.

   Text entered into the Detailed Information About this Event field can be edited with most of the same tools available in the rich text editor. See Using the Rich Text Editor on page 49.

   Note: if you click **Yes** following Is this a Notable Event? the event name is shown in red in the calendar application.

5. After completing the fields and selections in the New Event Form, click **Save**. Your event is added and shown in the calendar application.

6. Click **Close** to close the calendar application. Your web page calendar now contains your new event.

Note: to add a person as an administrator or editor for a selected calendar, click 

in the calendar application. The Calendar Group Administration dialog box opens. Click **Edit** by the calendar for which you want to add an administrator or editor. The Calendar Group Edit Form opens. Choose a name in the Administrators or Editors list or both. Then click **Save**. Your selections are saved.

10.2 Editing a Calendar Event

To edit an existing calendar event, follow these steps:

1. Click **Update Calendar**. The calendar application opens.

2. From the drop-down menu  , select the calendar on which your event is listed.
3. Select the month and year containing the calendar event. The calendar for that month opens.
4. Click the title of the calendar event to be edited. A calendar event detail dialog box opens.
5. Click **edit**. The Update Event Form opens.
6. Edit the event information in the Update Event Form.
7. Click **Save**. Your changes are saved and shown in the calendar application.
8. Click **Close** to close the calendar application. Your web page calendar now contains your edited event.

10.3 Deleting a Calendar Event

To delete a calendar event, follow these steps:

1. Click **Update Calendar**. The calendar application opens.
2. From the drop-down menu  , select the calendar on which your event is listed.
3. Select the month and year containing the calendar event. The calendar for that month opens.
4. Click the title of the calendar event to be deleted. A calendar event detail dialog box opens.
5. Click **delete**. The OK to Delete This Item? a dialog box opens.
6. Click **OK**. The calendar event is deleted and is removed from the calendar application.
7. Click **Close** to close the calendar application. Your web page calendar opens with your event deleted.

11 Editing Metadata

Metadata is information about the content of a web page stored in the **HTML** code of the page. **Metadata** is not displayed on the page but is accessed by search engines and web browsers. A page containing appropriate **metadata** is more likely to be found by search engines that readers use when searching for the kinds of content found on the page.

11.1 Types of Metadata

Although internet standards allow many kinds of **metadata** to be contained in a web page, this guide describes only three important kinds: title, keyword, and description **metadata**.

11.1.1 Title Metadata

Title **metadata** is a title for your web page. This title is not displayed on the page but appears in web browsers where the page being viewed is identified, for example, in web browser tabs. **Metadata** titles are also accessed by search engines.

11.1.2 Keywords Metadata

Keywords **metadata** is a list of words or phrases, separated by commas, that represents the content of your web page. Search engines access the keywords of web pages, and well-chosen keywords help readers find your page when they are looking for the content contained in it.

11.1.3 Description Metadata

Description **metadata** is a brief paragraph describing your web page in a few sentences. Search engines access description **metadata**, and most search engines display the descriptions contained in web pages when they show search results.

11.2 Adding and Editing a Page's MetaData

If a page displays an **Edit MetaData** button, you can edit its **metadata**. Follow these steps:

1. Click **Edit MetaData**. A MetaData Edit Form opens.

2. Enter appropriate **metadata** in the Title, Keywords, and Description fields. Separate words or phrases in the Keywords field with commas.

3. Click **Save**. Your **metadata** is saved. If you changed the title **metadata**, your new title is shown by your browser.

   Note: you can view the history of changes made to a page's **metadata** and access previously used **metadata** by clicking **History** in the MetaData Edit Form.

12 Editing Permissions

This section on editing permissions explains how an administrator uses the editor role, creates new users, assigns the editor role to users, and permits specific users to edit specific pages or **sections** (a web page and its subpages).

12.1 Overview of Users, Roles, and Permissions

Knowing a few basic concepts about permissions will help you understand the process of creating users, assigning roles, and assigning privileges.

12.1.1 Roles and Permissions

Assigning a role to a user permits the user to perform the actions allowed by the role. For example, when a user is assigned a content editor role by an administrator, the user can edit the content on web pages or **sections**. However, the user can only edit on pages or **sections** on which he or she is given permission to edit by an administrator. A user may also be given permission to edit on all pages of the web site. Administrator itself is a role that permits a user to perform many administrative actions, such as assigning roles.

12.1.2 Web Site Sections and Pages

Pages in a web site belong to **sections**. A **section** is a group of pages organized as subpages of a page called the **section home** and includes the **section home page**. That organization is determined by the file, or directory, the structure of the **section home page** and subpages. For example, a **section home page** in the subdirectory **`/city_services/index.jsp`** might have two subpages, **`/city_services/human_services.jsp`** and **`/city_services/voter_services.jsp`**. A web site's home page is itself a **section home page** under which all other **sections** are organized as subdirectories: **`http://www.cityofmansfield.net/city_services/voter_services.jsp`**.

Note, however, that by default if a user is given permission to edit a **section home page**, the user will also have permission to edit all its subpages, or descendants. The user's permission to edit any subpage can be overridden, however, by editing the permissions on that page.

12.1.3 Sequence of Tasks

When an administrator sets up users as content editors on a **Revize-enabled** site for the first time, the administrator must follow these steps in this order:

1. Create a content editor role.

2. Assign basic editing permissions (called data base permissions) to the content editor role.

3. Create users.

4. Assign the content editor role to each user.

5. Assign a key user or users permission to edit on the web site's home page. By default, the user or users are permitted to edit all pages of the web site.

   Note: this step is *required* and must be taken *before step 6*. Taking this step allows you to assign more selective permissions to other users on other pages or **sections**.

6. Assign other users permission to edit specific **sections** or pages.

12.2 Setting Up Roles, Users, and Permissions

The following steps show how an administrator sets up users as content editors on specific pages or **sections**. The steps must be taken in order and assume the administrator begins with a new web site that does not yet have content editors.

12.2.1 Opening the AdminCenter

To create a content editor role, the first step in this process, you must open the AdminCenter. Follow these steps:

1. Log in to the web site. See Logging In on page 11. The web site home page opens displaying edit buttons.
2. Click **Permissions**. The Revize Page Permissions edit form opens.
3. Click **Add User or Role via AdminCenter** at the bottom of the Revize Page Permissions edit form. The AdminCenter opens with navigational links displayed along its top and left side.

   Note: clicking **HELP** at the top of the AdminCenter opens a Revize Help and Documentation page with links to technical manuals and directions for obtaining Revize technical support.

12.2.2 Using the Editor Role

Your **Revize-enabled** site has built-in, default roles that cannot be changed and that confer site-wide permissions to users who are assigned the roles. By using the editor role that permits editing activities, you can selectively assign editing privileges to specific users on specific pages or **sections**. Follow these steps to assign a user to the editor role:

1. Click the **ADMIN PANEL** button on any of the pages within your website.
2. Click **PERMISSIONS** on the Admin Panel that appears on the top of your screen.
3. On the Permissions box that appears, scroll to the bottom and click on the **ADD USER** hyperlink.

4. The Admin Center page for your website will pop up. On this page, you will see a list of the users that are created on your website.

5. Find the user that you wish to set as an editor, and click the  button for that user account.

6. On the new **ASSIGN ROLE** page, click editor from the available roles list, and then click Add so it shows editor inside the Assigned Roles Menu. Click the Update button to assign the role to that user.

12.2.3 Assigning Editing Permissions to the Editor Role

Now that the user is set as an editor, you must assign the new user account to the specific section on your site you would like them to edit. Follow these steps:

1. The first thing you need to do is assign your website administrators to the homepage.

2. On the homepage of your site click on the Admin Panel button.

3. Click the Permissions button that is located on the Admin Panel that will appear at the top of your screen.

4. On the new Permissions window that opens, put a checkbox in all of the Administrator users that are on your website.

5. Click the Save button. The Administrators are now set to the homepage and every subpage to the homepage (which is the entire website). Your editors will now get permissions based on the Administrators permissions.

6. Now to assign editors to specific pages, go to the section of your site where you would want the new editor user to be able to have control of.

7. Click the Admin Panel button on the page you wish for the editor user to have edit powers.

8. Click the Permissions button that is located on the Admin Panel that will appear at the top of your screen.

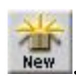
9. On the new Permissions window that opens, put a checkbox in the editor user accounts name.

10. Click the Save button. The editor user will now have permissions to edit on that page, and every subpage to the page they were assigned on.

12.2.4 Creating Users

You must now create the users to whom you will assign the content editor role. Follow these steps:

1. Click **USERS** at the left of the Admin-Center. A list of Users is displayed.

2. Click 

. The Create User dialog box opens.

3. Complete the fields in the Create User dialog box for your new user. An entry is required in only three fields: User Id, Password, and Confirm Password.

4. Click **Create**. The List of Users opens showing your new user, the user's ID, and the user's assigned roles.

12.2.5 Assigning the Editor Role to Users

To assign the content editor role to users, follow these steps:

1. Make sure the List of Users is open by clicking **ADMINISTRATION** and then click **USERS**.

2. Click 

for a user. The Assign Role dialog box opens for the user you selected.

3. Click **Add**. Your content editor role is moved to the Assigned Roles list.

4. Click **Update**. The List of Users opens showing the editor role assigned to the user.

5. After assigning the content editor role to one or more users, close the AdminCenter page by clicking your browser's close button (**X**). The Page Permissions edit form opens showing the editor role you created and the new users you created.

12.2.6 Assigning Permission to Edit on Your Site's Home Page

At this point, you have assigned a user or users content editing privileges, but you have not given any of those user's permission to edit specific pages or **sections**.

Caution: by default, at this point, all the users to whom you have assigned the content editor role can now edit any page on your entire web site. The next step you will take is to assign a key user or users permission to edit *on your site's home page*. By making that content editor assignment on your home page, the user or users are permitted to edit all pages on your site. However, making the assignment is necessary and allows you to selectively assign content editing permissions to other users limited to specific pages or **sections**.

To assign a key user or users permission to edit on your site's home page, follow these steps:

1. Navigate to your web site's home page. Generally, the **URL** of the home page will be short and without subdirectories (for example, **`http://www.cityofmansfield.net/`**).

2. Log into your site. See Logging In on page 11.

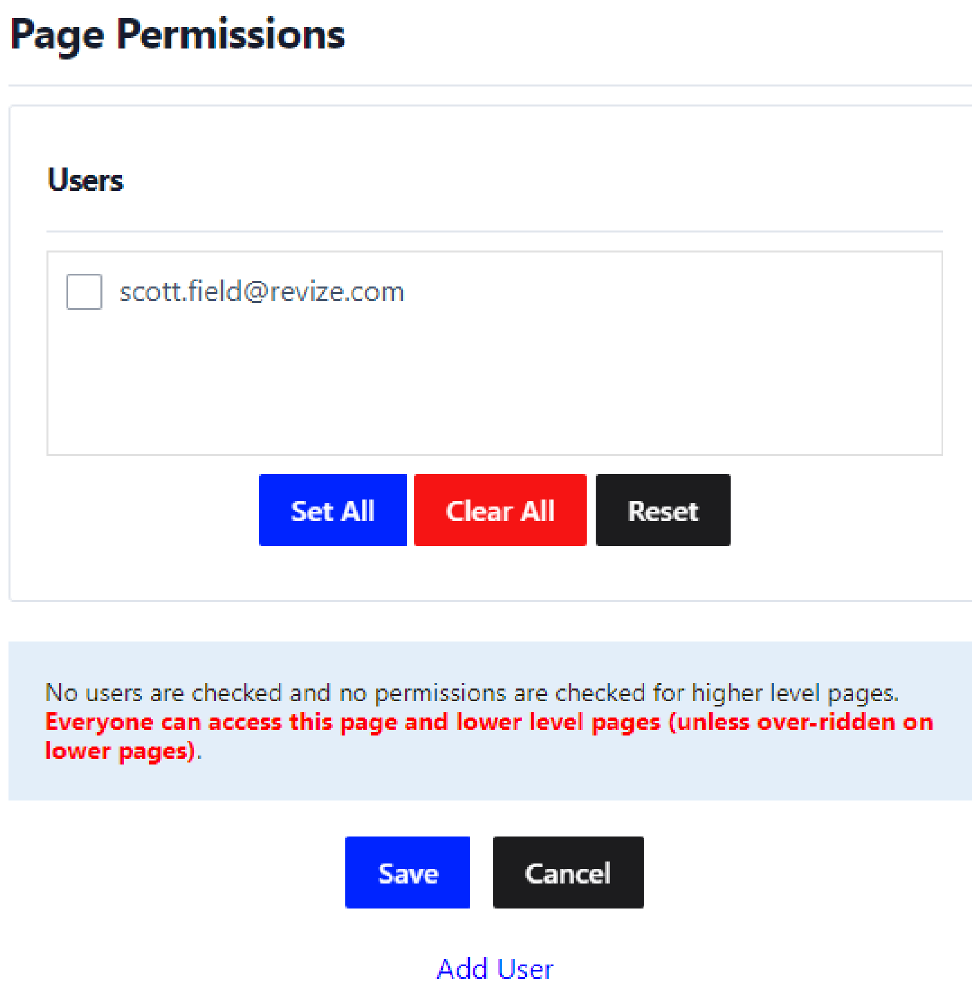
3. Click **Permissions** on your site's *home page*. The Revize Page Permissions edit form opens. In the example of a Revize Page Permissions edit form shown on page 94, **`Amy`** is an administrator, and **`daveo`**, **`jamest`**, and **`walterb`** are users who have been assigned your new editor role.

4. In the Permissions section, click one or more of the users shown in the Users list. To select more than one user, hold down the control key on your computer keyboard and select other users. Using the Roles list is explained in Assigning Users Permission to Edit Other Pages and Sections on page 93.

5. Click **Save**. Your site's home page re-opens. The user or users you selected can now edit all pages of your web site.

12.2.7 Assigning Users Permission to Edit Other Pages and Sections

To assign permission to other users to edit the content on specific pages or **sections** follow these steps:



1. Navigate to the page on which you want to give a user or users permission to edit content. If the page is a **section home page**, the permission will also apply to all its subpages, or descendants. **Section home pages** and subpages are explained in Web Site Sections and Pages on page 87.

2. Click **Permissions**. The Revize Page Permissions edit form opens.

3. In the Permissions section of the Revize Page Permissions edit form, select a user or users to give the editor permission to. You can also select a role or roles.

By selecting a role, you select all the users who have been assigned the role. You can also make selections in both the Roles list and Users list.

To select more than one user or role, hold down the control key on your computer keyboard and select additional users or roles.

Note: in this step, you can select a user or users from the Users list; you can select a role or roles from the Roles list, or you can do both. *Note, however, that when you select a role, you are actually selecting users—all those users who have been assigned the role you select*.

For example, suppose your Users list displays three users, and you know all three have been assigned your editor role. Suppose also that the Roles list displays one role, **`editors`**. You can give all three users permission to edit on your page or **section** by selecting each user in turn in the Users list, holding down the Control key on your computer keyboard as you make your selections. Alternatively, you could select **`editors`** in the Roles list and accomplish the same thing. You needn't do both. Remember, however, that by selecting **`editors`** *all* users with the content editor role will be given permission to edit the page or **section**. Finally, if you wanted to make only one or two of the users in the User list content editors, then you would have to select them individually.

4. After making your selections in the Permissions section, click **save**. The web page re-opens. The user or users you selected are now content editors on the page and its subpages.

13 Selecting Workflows

The workflow in a **Revize-enabled** web site is a series of steps that must be taken before changes made to content in the site are made public. Generally, each step is a point at which the content must be reviewed and approved by a designated user, such as a manager or company executive. After the content is approved, rejected, or edited at one step, it passes on to the next appropriate step. Only after all required approvals have been made is the content published to the web site.

Sites may have several different workflows. Usually, a unique workflow is created for each **section** of a web site overseen by a manager or managers tasked with approving that **section's** content.

13.1 Features of Revize Workflows

These are some of the main features of Revize workflows:

- Workflows are created by workflow developers, typically IT technicians, who build into workflows the stages and processes requested by managers. Ideally, each department with responsibility for a part of a web site develops a unique workflow for managing changes made to its pages.
- At any stage in a workflow, approval can be required of one designated user or can be made collaborative and required of two or more approvers.
- At any stage in the workflow, developers can insert branches for normal approval, for transfer of rejected content to earlier stages, or for other steps required by exceptional situations.
- Approvers receive immediate email notification of new task assignments as content moves through a workflow.

13.2 Selecting a Workflow for a Section or Page

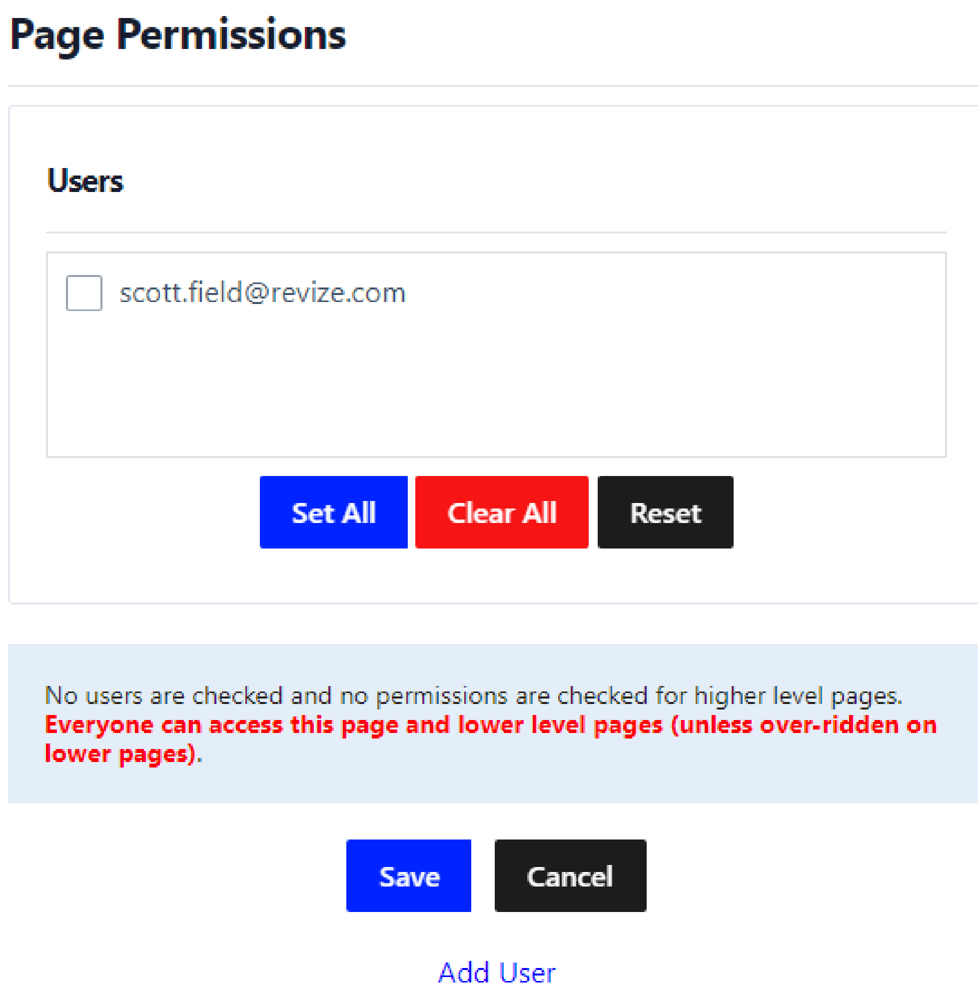
Typically, editors are not involved in creating workflows. However, an editor with administrator privileges may have occasion to select a workflow for a web site **section** or page. If no workflow is selected for a page or **section**, any changes to its content are published without review. Follow these steps to select a workflow:

1. Log into your web site. See Logging In on page 11.

2. Navigate to the page or **section home page** for which you want to select a workflow.

   Note: when you select a workflow for a **section home page**, the workflow will apply to all the subpages, or descendants, of the **section home**. For an explanation of **sections** and pages, see Web Site Sections and Pages on page 87.

3. Click **Permissions** on the page you selected. The Revize Page Permissions edit form opens:



4. In the Workflow section of the Revize Page Permissions edit form, select the workflow you want to use for the **section** or page.

5. Click **Save**. The workflow is assigned to the **section** or page, and the page re-opens.

13.3 Changing the Workflow for a Section or Page

If you have administrator privileges, you can change the workflow for a **section** or page by following these steps:

1. Log into your web site. See Logging In on page 11.
2. Navigate to the page or **section home page** on which you want to change the workflow.

   Note: when you select a workflow for a **section home page**, the workflow will apply to all the subpages, or descendants, of the **section home**. For an explanation of **sections** and pages, see Web Site Sections and Pages on page 87.
3. Click **Permissions** on the page you selected. The Revize Page Permissions edit form opens.
4. In the Workflow section of the Revize Page Permissions edit form, select the workflow you want to use for the **section** or page.
5. Click **Save**. The workflow is assigned to the **section** or page, and the page re-opens.

14 Using the Revize Letter Email System

Revize Letter is a versatile, easy-to-use system for email marketing and other kinds of communication with interested readers. Revize Letter is typically installed alongside a **Revize-enabled** web site and used by nontechnical content editors who have permission to add, edit, and send emails to newsletter subscribers.

14.1 Revize Letter Features

Revize Letter users add, edit, and delete email contacts (recipients) and assign contacts to interest groups. Interested readers can also sign up for newsletters using signup forms on **Revize-enabled** web pages. Users can import and export lists of contacts to and from Revize Letter from a variety of sources.

Revize Letter users create new newsletters or edit existing ones using built-in templates or by creating **HTML** content from scratch. A built-in rich text editor simplifies the process. Users select newsletters to mail and select recipients from among the contacts stored in the system under their user accounts. Users can choose all contacts or contacts in an interest group or groups and can add or delete individual contacts as needed.

After sending newsletters, Revize Letter users can view an activity report for any mailing showing detailed information about the process, including the number of emails sent, the number sent successfully and unsuccessfully, the success rate, and the number read by recipients. Emails always offer recipients an unsubscribe option, and mailings are optimized to pass through spam filters.

Note: When an email recipient clicks Click Here To Unsubscribe at the bottom of an email sent by Revize Letter, the recipient's email address is removed from the list of contacts belonging to the user who sent the email.

14.2 Software Requirements

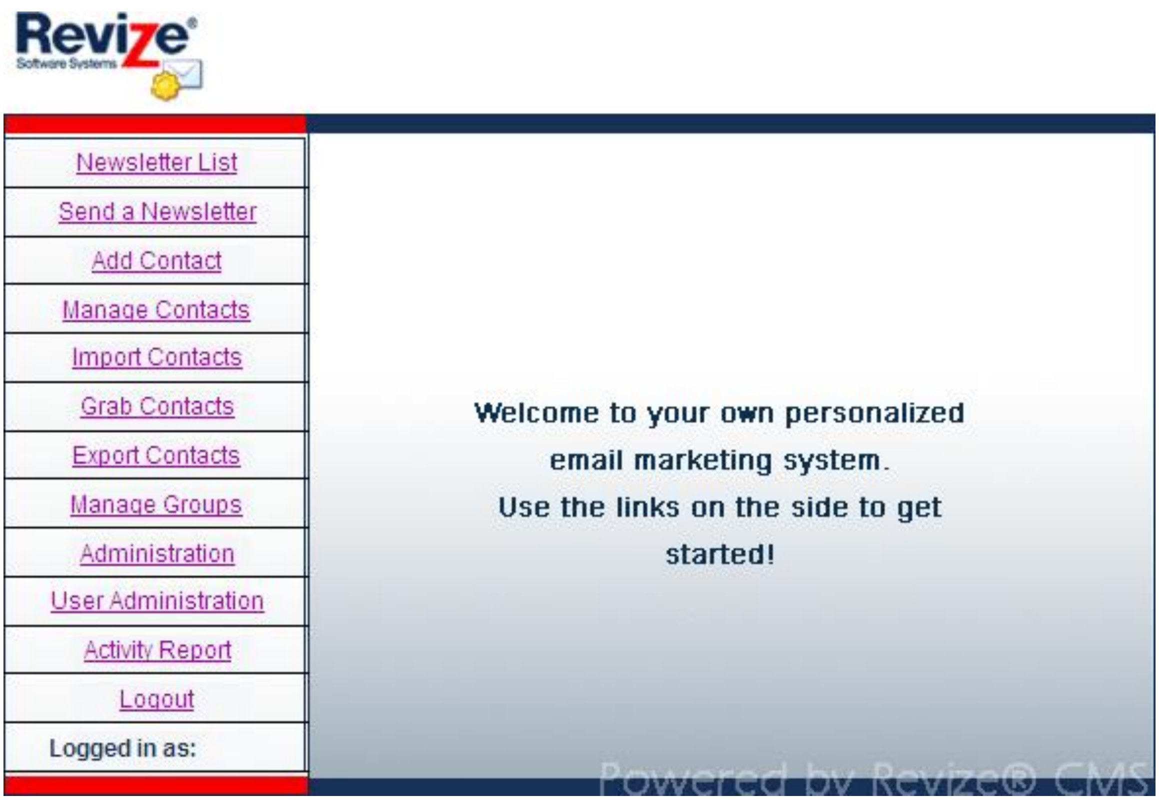
To use all the features of Revize Letter, use the Microsoft Internet Explorer web browser.

14.3 Logging In and Out of Revize Letter

To log into Revize Letter, open the web page hosting your installation using the Microsoft Internet Explorer web browser. The login dialog box, Please log in to Access Revize Letter, opens.

14.3.1 Logging In

To log in, enter your user name and password in the login dialog box. Then click **Submit**. You are logged in, and the Revize Letter application opens:



Note: when working within Revize Letter, you can use your browser's Back function to navigate among edit forms and dialog boxes. You can also click any link in the commands column at any time.

14.3.2 Logging Out

To log out of Revize Letter, click **Logout** at the bottom of the links on the left side of the application. You are logged out, and the login dialog box opens.

14.4 Creating and Editing Groups

Before adding contacts to the Revize Letter, you can create interest groups. Then, when you add contacts, you can easily assign them to a group or groups. However, you can add and edit groups at any time.

To add or edit groups, click **Manage Groups**. The Manage Groups dialog box opens.

- To add a group, click **New**. The Create Group dialog box opens. Enter a name for your new group. Then click **Save Settings**. The Manage Groups dialog box opens with your new group listed.
- To edit a group, click **Edit** by the group. The Edit Group dialog box opens. Change the name of the group. Then click **Save Settings**. The Manage Groups dialog box opens showing the edited group name.
- To delete a group, click **Delete** by the group. The dialog box, Are you sure you want to delete this group? opens. Click **OK**. The Manage Groups dialog box opens with your group deleted.

14.5 Adding Contacts

You can add contacts (email recipients) to your Revize Letter account by entering data for each contact individually, by importing a list of contacts taken from another application, or by grabbing contacts from your Yahoo!, MSN Hotmail, or Google Gmail contact list.

Note: when you use Revize Letter, the system gives you access to and displays only the contacts associated with your user account.

14.5.1 Adding Individual Contacts

To add an individual contact to Revize Letter, follow these steps:

1. Click **Add Contact**. The Add a Contact dialog box opens.

2. Complete the fields in the Add a Contact dialog box.

3. Select a group or groups for the contact if groups are displayed.

4. Click **Submit**. Your contact is added and acknowledged with Contact added.

14.5.2 Importing Contacts

You can import a list of contacts from other applications if the list is in the form of a **comma-separated values** (**CSV**) **file**. The **CSV** file you use is basically a text file in which each line contains information for one contact. Each line should contain the contact's first name followed by a comma, followed by the contact's second name followed by a comma, followed by the contact's email address.

Note: You can save a Microsoft Excel spreadsheet containing a list of contacts as a **CSV** file by saving the file in the **CSV** (comma delimited) (*.csv) file type. The file should not contain a header row and should have only three columns for the first name, last name, and email address.

To import a **CSV** file of contacts to Revize Letter, follow these steps:

1. Click **Import Contacts**. The Import Contacts dialog box opens.

2. Click **Browse**. A display of the files and folders on your computer opens.

3. Select a file.

4. Click **Open**. The Import Contacts dialog box opens.

5. If you wish, you can select a group or groups to assign your contacts to if groups are displayed.

6. Click **Submit**. Your contacts are imported and acknowledged by Import Successful.

Note: you can import your Microsoft Outlook contacts to Revize Letter by first exporting them to a **CSV** file. (Click **File** in Outlook and then **Import and Export…**) Edit the resulting **CSV** file in Microsoft Excel to delete the header row and all columns except those for first name, second name, and email address. Save the spreadsheet as a **CSV** file and then import it to Revize Letter following the steps above.

14.5.3 Grabbing Contacts from Email Accounts

Revize Letter can import, or grab, contacts from some web-based email accounts.

Note: many web-based email services allow users to export their contact lists in the form of **CSV** files. You can then import the **CSV** file into Revise Letter. See Importing Contacts on page 103. Use this method of importing contacts from web-based email accounts if the following method is not available for your email service.

To grab contacts from a web-based email account, follow these steps:

1. Click **Grab Contacts**. The Grab Contacts dialog box opens.
2. Enter your user name and password for one of the available email services.
3. Click **Grab my contacts**. Your contacts are imported and acknowledged by Import Successful.

14.6 Managing Contacts

Once contacts are added to your Revize Letter account, you can edit contact information or delete contacts. You can select contacts belonging to an interest group or you can search for individual contacts using their first names, last names, or email addresses.

14.6.1 Editing Contact Information

To edit a contact's information, follow these steps:

1. Click **Manage Contacts.** The Manage Contacts dialog box opens displaying all your contacts. You can change the order in which contacts are listed by clicking one of the column headings, **Name**, **Email**, or **Interest Group(s)**.

   You can search for a contact by entering the contact's first name, last name, or email address in the search field and clicking **Search**. The search results are displayed.

   You can also view all contacts in an interest group by selecting the group if groups are shown in the drop-down menu Filter List By Group. The contacts in the group are displayed.

2. Click **Edit** by the contact you want to edit. The Edit a Contact dialog box opens.
3. Complete the fields and selections in the Edit a Contact dialog box.
4. Click **Submit**. The contact information is changed and acknowledged by Contact has been updated.

14.6.2 Deleting Contacts

To delete a contact or contacts, follow these steps:

1. Click **Manage Contacts**. The Manage Contacts dialog box opens displaying all your contacts. You can change the order in which contacts are listed by clicking one of the column headings, **Name**, **Email**, or **Interest Group(s)**.

   You can search for a contact by entering the contact's first name, last name, or email address in the search field and clicking **Search**. The search results are displayed.

   You can also view all contacts in an interest group by selecting the group if groups are shown in the drop-down menu Filter List By Group. The contacts in the group are displayed.

2. Select the contacts you want to delete or select **Check All** to check all contacts displayed.
3. If you have clicked **Check All**, click **Delete Checked**. The dialog box, Are you sure you want to delete the selected contacts? opens. Click **OK**. All the contacts selected are deleted.

If you have selected an individual contact or contacts, click **Delete** next to each contact. The dialog box, Are you sure you want to delete the specified contact? opens. Click **OK** to delete each contact. The contact is deleted.

14.6.3 Exporting Contacts

You can export your Revize Letter contacts to a **CSV** file (see page 103) by following these steps:

1. Click **Export Contacts**. A dialog box, Opening contacts.csv, opens.
2. Select **Save File**. Then click **OK**. A dialog box, Enter the name of the file to save to…, opens.
3. Choose a folder and file name for your file.
4. Click **OK**. Your file is saved to the location selected on your computer.

14.7 Creating and Editing Newsletters

Revize Letter makes it easy to create, edit, and delete newsletters.

Note: edit forms for adding and editing newsletter content usually display **history** buttons. Clicking **history** gives you access to previous versions of the area you are editing.

14.7.1 Creating a New Newsletter

Follow these steps to create a new newsletter:

1. Click **Newsletter List**. The Add/Edit Newsletters dialog box opens.

2. Click **New**. If **New** is not displayed, click **Login to Add/Edit Newsletters**. Please log in to the Update Site dialog box opens.

3. Enter your user name and password. Then click **Submit**. See Logging In and Out of Revize Letter on page 100. The Newsletter Subject and Design dialog box opens.

4. Enter the subject line for your newsletter in the field below entering Newsletter Subject.

5. Select a background color for your newsletter by clicking . Color options are displayed.

6. Click the color you want for your background. The color value is shown in the Newsletter Subject and Design dialog box.

7. Select one of the four newsletter templates.

8. Click **Create or Update Newsletter Using Above Subject and Design Selection**. The Add/Edit Newsletters dialog box opens listing your new newsletter.

9. Click the name of the new newsletter (not **Edit**). The newsletter opens with edit buttons marking areas where you can add content.

14.7.2 Adding Content to a New Newsletter

To add content to a newsletter follow these steps:

1. Click **Newsletter List**. You may be asked to log in (see Logging In and Out of Revize Letter on page 100). The Add/Edit Newsletters dialog box opens.

2. Click the name of the newsletter you want to add content to (not **Edit**). The newsletter opens with edit buttons marking areas where you can add content.

Edit buttons on a newsletter open one of two types of edit forms, one for adding and editing images alone and one for adding and editing text areas that may also incorporate images.

When you click **Edit** for an area containing an image alone, an image edit form opens. You will see some or all of these image editing options:

- **change image**—click to add or edit an image. The Image Manager opens. Select the image you want. Then click **Save**. Your image is saved to your newsletter. See Using the Image Manager on page 37 for instructions.

- Select Newsletter Background Color—Select a background color for the image by clicking . Color options are displayed. Click the color you want for your background. The color value is shown in the image edit form.

- Feature Image Links To—enter the **URL** of a web page to open when the image is clicked.

- **save**—click **save** in the image edit form to save your changes. The newsletter opens showing you a new image.

When you click **Edit** for an area containing text that may also incorporate images, the rich text editor opens. Use the rich text editor to add and format your content or edit existing content. See Using the Rich Text Editor on page 49 for complete instructions. Click **save** after adding or editing your content. Your content is saved and shown in your newsletter.

14.7.3 Editing an Existing Newsletter

To edit an existing newsletter, follow these steps:

1. Click **Newsletter List**. You may be asked to log in (see Logging In and Out of Revize Letter on page 100). The Add/Edit Newsletters dialog box opens.

2. To edit the subject line, background color, or template of an existing newsletter, click **Edit** next to the newsletter. The Newsletter Subject and Design dialog box opens.

   Edit the fields and selection in the Newsletter Subject and Design dialog box. Then click **Create or Update Newsletter Using Above Subject and Design Selection**. The Add/Edit Newsletters dialog box opens listing your newsletter.

3. To edit the image and text content areas of an existing newsletter, click the newsletter name (not **Edit**). The newsletter opens with edit buttons marking areas where you can edit content.

   Click **Edit** for the area you want to edit. An image edit form or the rich text editor opens depending on the area you select. Make your changes in the image edit form or the rich text editor. Then click **Save**. Your changes are saved, and the newsletter opens. See Adding Content to a New Newsletter on page 108 for instructions on editing image and text areas.

14.7.4 Deleting a Newsletter

To delete a newsletter, follow these steps:

1. Click **Newsletter List**. You may be asked to log in (see Logging In and Out of Revize Letter on page 100). The Add/Edit Newsletters dialog box opens.

2. Click **Del** next to the newsletter you want to delete. The OK to Delete This Item? a dialog box opens.

3. Click **OK**. The Add/Edit Newsletters dialog box opens showing the newsletter deleted.

14.8 Using Administrative Settings

Before emailing a newsletter, you may want to edit the administrative settings that determine the "from" name and email address for your mailing. Follow these steps:

1. To edit administrative settings, click **Administration**. The Administrative Settings dialog box opens.

2. Enter a "from" name and email address.

3. Click **Save Settings**. Your settings are changed and acknowledged by Settings have been updated.

14.9 Sending a Newsletter

To send a newsletter, follow these steps:

1. Click **Send a Newsletter**. A dialog box opens for selecting a newsletter and contacts.

2. Select a newsletter to send from the drop-down menu Please Select a Newsletter.

3. To select contacts, click **Click here to Add Contacts**. The Add Contacts To Email dialog box opens displaying all your contacts. You can change the order in which contacts are listed

by clicking one of the column headings, **Name**, **Email**, or **Interest Group(s)**.

You can search for a contact by entering the contact's first name, last name, or email address in the search field and clicking **Search**. The search results are displayed.

You can also view all contacts in an interest group by selecting the group if groups are shown in the drop-down menu Filter List By Group. The contacts in the group are displayed.

4. Select the contacts you want to send your email to or click **Check All** to check all contacts displayed.
5. Click either **Add Checked Contacts To Email** or **Add All Contacts To Email**. **Add All Contacts To Email** adds all contacts displayed, not all contacts in the Revize Letter contacts database. The dialog box for selecting a newsletter and contacts opens showing the contacts you have selected.
6. You can now remove individual contacts by clicking a contact in the list of contacts and clicking **Remove**. The contact is removed from the list.
7. To send the newsletter, click **Send Newsletter**. The newsletter is scheduled to be sent and acknowledged by Newsletter has been scheduled successfully. These emails will be sent within 10 minutes.

14.10 Viewing Activity Reports for Mailings

You can view a report containing detailed information about any mailing, including the status of the mailing, the number of emails sent, the number sent successfully and unsuccessfully, the success rate, and the number read by recipients. Follow these steps to view an activity report:

1. Click **Activity Report**. The Email Activity Report–Level I opens. Level I shows combined information for all mailings by each user listed.

2. To view a report listing each mailing made a user, click the user's name. The Email Activity Report–Level II opens. Level II shows basic information for each mailing made by the user.

3. To view a more detailed report about an individual mailing, click the email ID of the mailing. The Email Activity Report–Level III opens.

   The column Fix Email for future in the Level III report contains email addresses of failed mailings. To correct an email address shown in the column, click the address. The Edit a Contact dialog box opens where you can correct the email address. Then click **Submit**. Your change is saved.

14.11 Managing Revize Letter Users

If you have Revize Letter administrator privileges, you can add and delete users and edit the role and organization assigned to existing users.

14.11.1 Adding Revize Letter Users

To add a new Revize Letter user, follow these steps:

1. Click **User Administration**. The User Administration dialog box opens displaying a list of users, their roles, and their organizations.

2. Click **New**. The Create User dialog box opens.

3. Enter a user name for the new user. Select a role and an organization for the new user.

4. Click **Save Settings**. The user is created and acknowledged by the user created.

   Note: when a new user is created, his or her password is set to the standard password for your Revize Letter installation.

14.11.2 Editing a User's Role and Organization

To edit a Revize Letter user's role or organization, follow these steps:

1. Click **User Administration**. The User Administration dialog box opens displaying a list of users, their roles, and their organizations.

2. Click **Edit** for the user you want to edit. The Edit User dialog box opens.

3. Edit the role and organization for the user.

4. Select **Reset Password** if you want to reset the user's password to the standard password for your Revize Letter installation.

5. Click **Save Settings** to save your changes. Your changes are saved and acknowledged by User Updated.

14.11.3 Deleting Revize Letter Users

To delete a Revize Letter user, follow these steps:

1. Click **User Administration**. The User Administration dialog box opens displaying a list of users, their roles, and their organizations.

2. Click **Delete** by the user you want to delete. The dialog box, Are you sure you want to delete this user? opens.

3. Click **OK**. The User Administration dialog box opens showing the user deleted.

Glossary

anchor—an area of text marked with **HTML** code as a location that can be used as a destination for a hyperlink

CMS—see **web content management system**

comma-separated values file—a data file with extension .csv formatted as text in which, for Revize Letter, each line contains data for one email contact with the contact's first name followed by a comma, followed by the contact's second name followed by a comma, followed by the contact's email address

CSS—Cascading Style Sheet, a set of formatting instructions in **HTML** code that applies uniform formatting to multiple web pages

format—a set of formatting rules, including paragraph and font size rules, applied to a paragraph with one click using the rich text editor

HTML—see **Hypertext Markup Language**

Hypertext Markup Language—the computer coding used to format text and images in web pages and viewable in most web browsers by selecting View Source

metadata—the information contained in web page code but not displayed by browsers that describe the page's content and that is accessed by search engines

PDF—Adobe Portable Document Format, a means of transmitting and presenting documents that preserve original document formatting and that is compatible with all computer operating systems

Revized-enabled—refers to web sites designed or modified by the **Revize Web Content Management System** to allow easy management of content by nontechnical editors

Revize Web Content Management System—a system that permits easy management of web page content by nontechnical editors

Revize Web CMS—see **Revize Web Content Management System**

section—a group of web pages organized by their file structure as subpages of a page called the **section home** and including the **section home page**

section home page—see **section**

style—a set of formatting rules for font family and font size applied to text in a paragraph with one click using the rich text editor

URL—Uniform Resource Locator, an address, such as **`http://www.revize.com`**, used by computers to access documents, web pages, and other resources on the internet

web content management system—a system for easily adding and updating web page content without having to edit web page **HTML** code