CIVICASOFT

Content Mangement System

Civica Software has designed and built a modular system of applications designed specifically for government to connect residents, businesses, and visitors. Cities, Counties, Organizations, and Government Agencies can choose any of the specific applictions that best fit their needs or budgets.

At the foundation of the applications lies a robust and powerful management engine, combining a database, the Civica Admin Module and the Civica Content Management System (CMS). The CMS allows all data to be stored and accessed through custom web-based templates that permit authorized users to update their information directly on the website or intranet.

This document will guide you through the modules that have been selected by your organization and assist you with understanding how each work and how to use them.

The Civica Software Modular System is based around Administrative Rights. Depending on the rights assigned, the user will be able to use each module to its full functionality. See your system administrator on your rights and modules you have been assigned.

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A-Z Index Module Instructions

This module enables the user to quickly retrieve the site navigation in alphabetical order allowing for quick referencing and identification.

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New Index 4
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Back

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A-Z INDEX

MANAGE INDEX

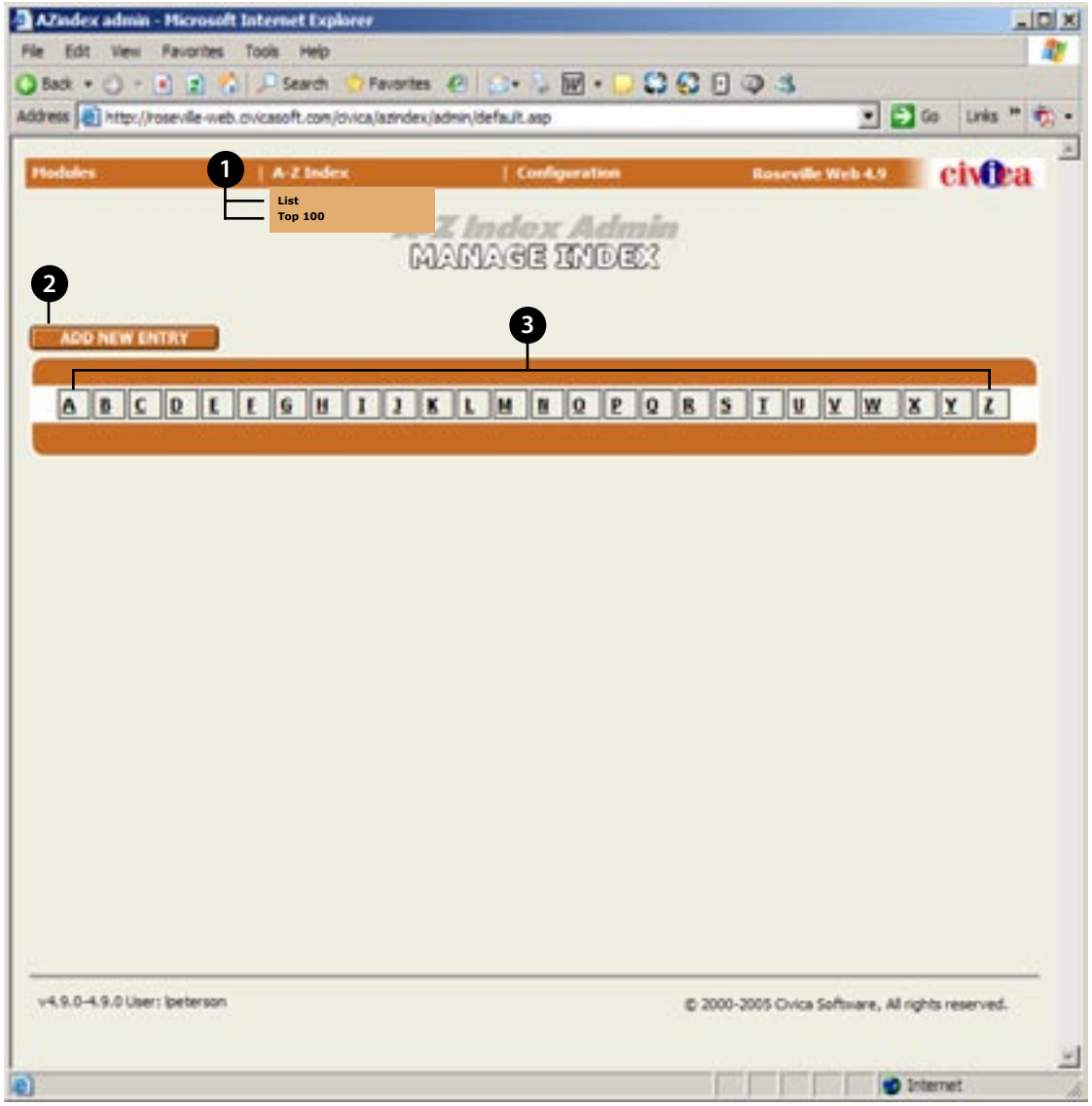
1. **A-Z Index Dropdown Menu:** Underneath the A-Z Index dropdown menu you will find two options:

   List: This will show the complete list for a specific letter of the alphabet.

   Top 100: This will show the top 100 pages searched for in the site.

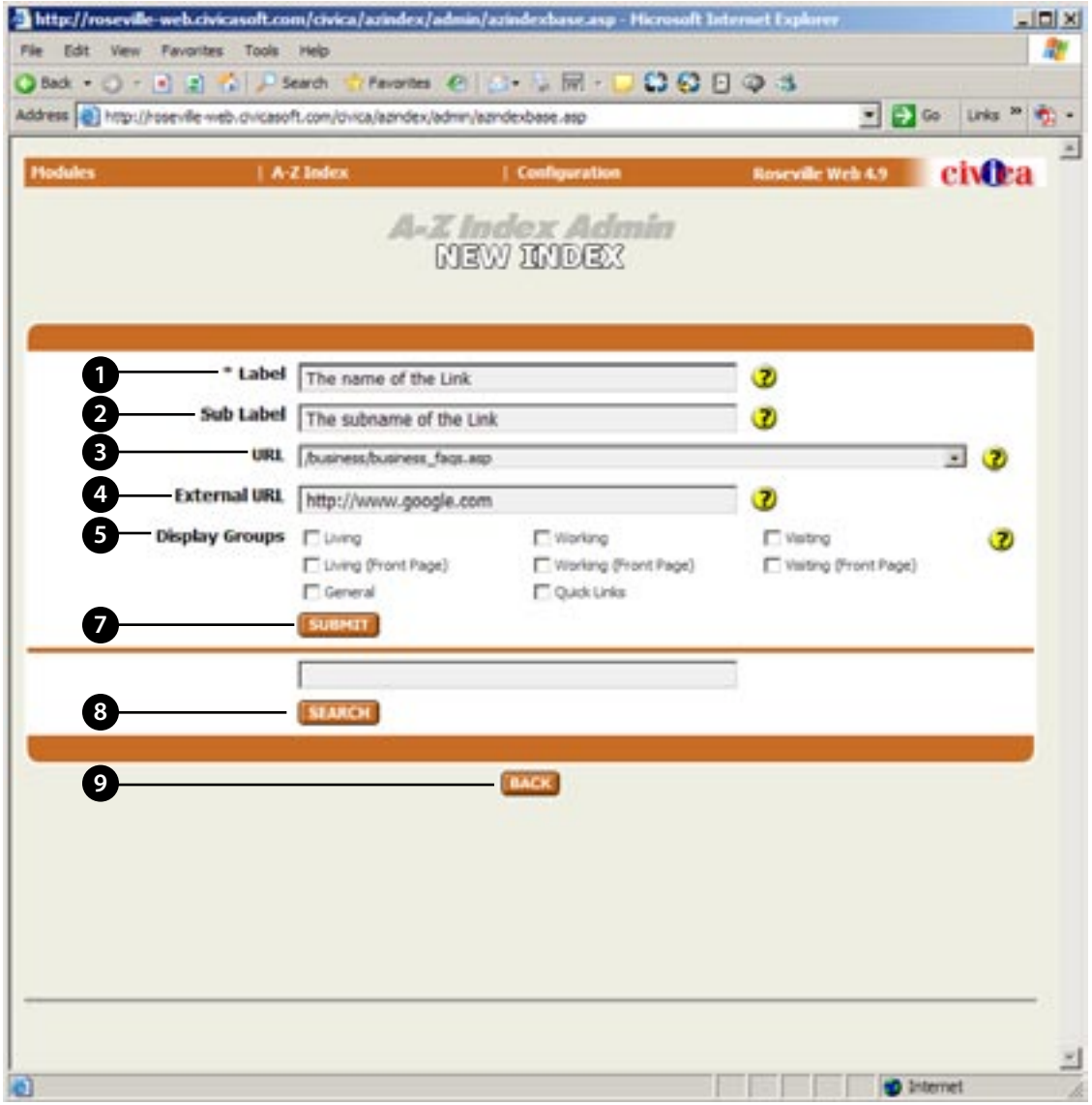
2. **Add New Entry:** You can easily create a new A-Z Index entry by clicking this button.

3. **Alphabet Letters:** Click a letter to see A-Z Index items beginning with that letter.



A-Z INDEX

NEW INDEX



1. **Label:** The name of the Link that will appear in the display list page.

2. **Sub Label:** This is the text name that follows the link name in the index list.

3. **URL:** Select a URL from the drop down list. Note: The list is dynamically generated from the navigation via Sitebuilder. For more information regarding the dynamic URL list, please contact your City Internet Administrator.

4. **External URL:** This is where you can link to external URLs, files, images, video, etc. (i.e. http://www.google.com or http://www.ci.city.ca.us/pdfs/anyfile.pdf).

5. **Display Groups:** By choosing one of the display groups, you can assign the link to a specific page that has been setup by the City Internet Administator.

7. **Submit:** By clicking this button you will submit the entry to the A-Z Index.

8. **Search:** If you want to see what other Index items have been posted about your subject, enter an item in the Search field and a click Search. A list will pop-up showing you related A-Z Index entries.

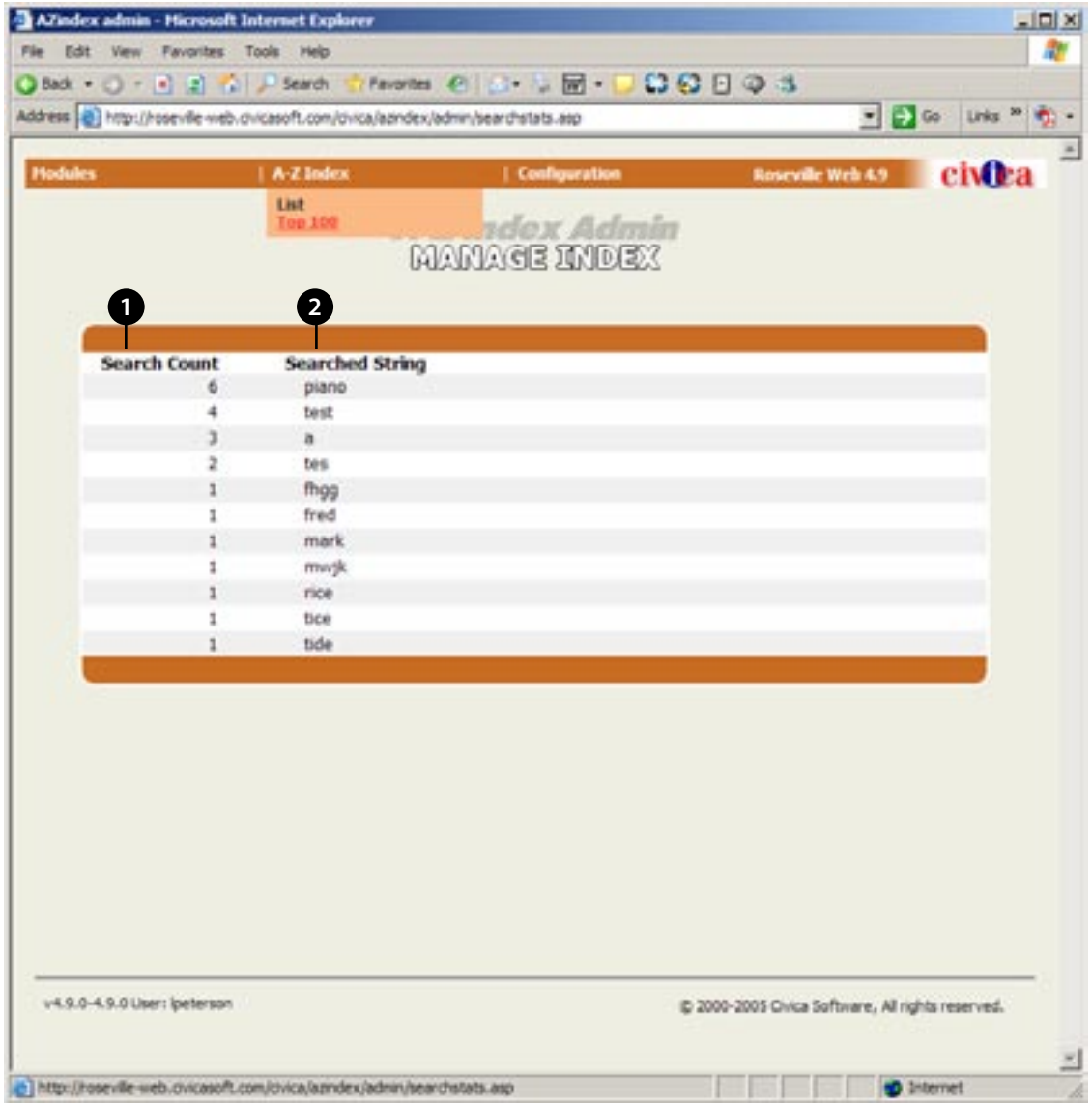
9. **Back:** Clicking this button will bring you back to the previous page without saving your information.

A-Z INDEX

TOP 100

The TOP 100 list is generated by the search results from every page in the site. If anyone enters a word or words into the search field located at the top of every page on the site (see example below).

If the word 'City Council' or 'Agendas' is entered and submitted into the search field, it will show up in the searched string and count how many times the word or phrase has been counted.



1. **Search Count:** This is the name of the top 100 strings that has been searched.

2. **Search String:** This is the text name that follows the link name in the index list.

3. **Web Site Search Box:** This is what the Search box looks like on every page of the web site.

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Calendar Module Instructions

The Calendar module allows the user to alert visitors and staff to events and dates within the community or organization. Events can be set up for reoccurring or single day entries and can be set in advance for specific day postings. The following instructions are designed to outline this modules capability and to offer instructions on how to build and control events entered into the module.

CALENDAR TABLE OF CONTENTS

Manage Files 3
Month Arrows
Year Arrows
Calendar Legend
Jump to Today
Jump to Month
Today's Events

Manage Events... continued..... 4
Add New Entry
Modify
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Last Modified
Click Here for more info
Events

New Events / Modify 5
Event Title
Audiences
Divisions
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Date Info
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New Events / Modify... continued 6
Additional Notes
Image
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Contact Phone
Associated Link
Associated Link Text
Active
Submit / Reset / Back

Within the Web Browser: Calendar 7
Calendar Name
View List By
Month and Year
Print
Specific Day
Event

Within the Web Browser: Specific Event 8
Mini-Calendar
View List By
Today's Activities
Calendar Legend
Jump to Today / Month
City Events
Add to my Outlook Calendar

CALENDAR

MANAGE EVENTS

1. **Month Arrows:** Click the red arrows to move the calendar back a month or forward a month.

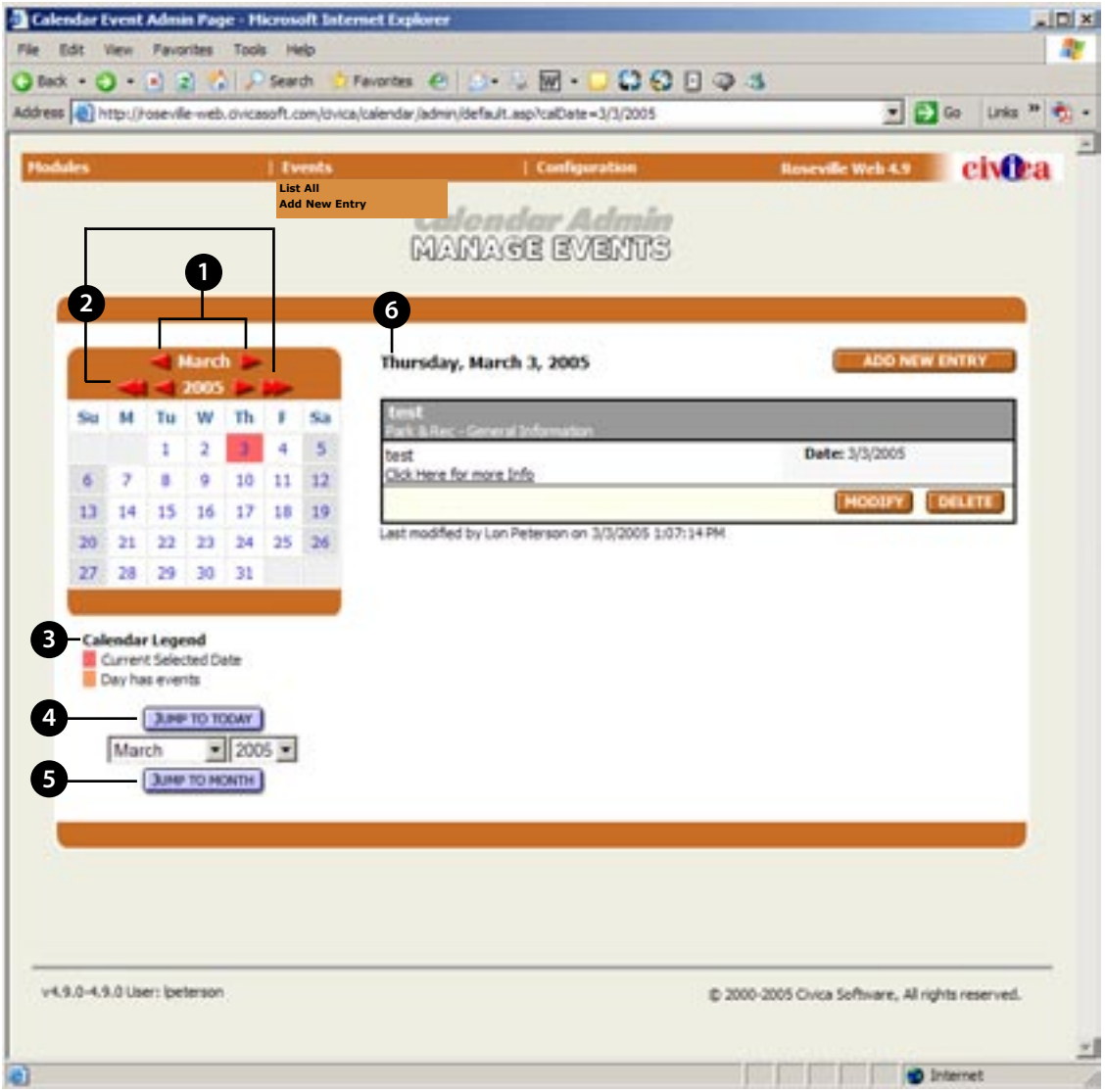
2. **Year Arrows:** The single arrows move the calendar back a year or forward a year. The double arrows move the calendar back ten years or forward ten years.

3. **Calendar Legend:** If a day on the calendar is shaded pink it is the day you are looking at. [Ex. The graphic to the right says it is March 3, 2005.] If a day on the calendar is shaded orange the day has at least one event scheduled.

4. **Jump To Today:** Click this button to jump to events scheduled for today.

5. **Jump To Month:** Select a month and a year that you want to view in the calendar, and click Jump To Month to get there easily. This comes in handy when you are scheduling an event that is in the distant future.

6. **Today's Events:** Events scheduled for today's date will show up here. If you click on a specific day on the calendar you will also see what is happening on that day.



CALENDAR

MANAGE EVENTS... CONTINUED

7 **Add New Entry:** Click this button if you would like to create a new calendar entry.

8 **Modify:** Click this button if you would like to modify the calendar entry.

9 **Delete:** Click this button if you want to delete this specific calendar entry.

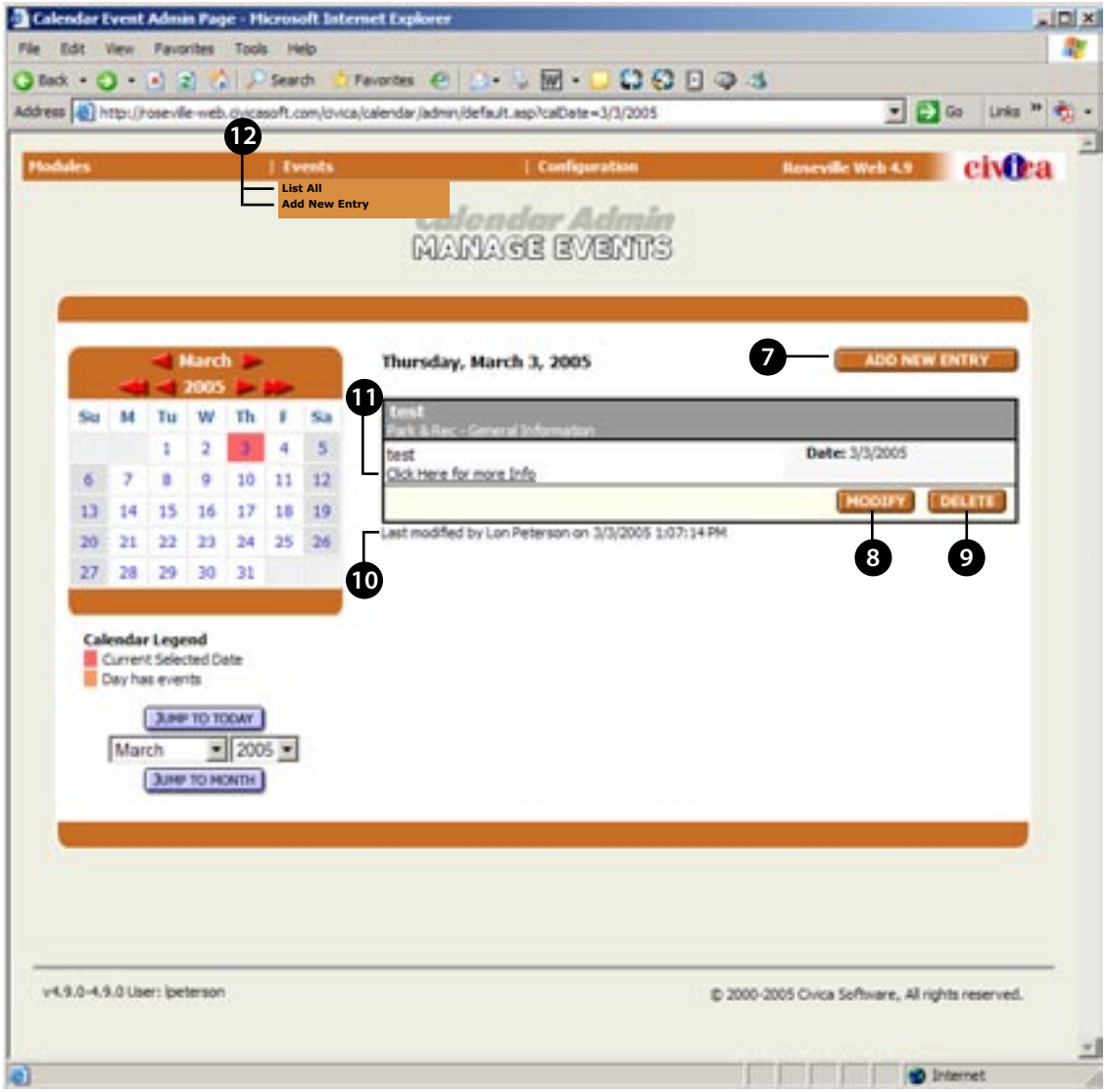
10 **Last Modified:** This line of text tells you what user last modified this calendar entry, and when they did it.

11 **Click Here for more Info:** This links toyou to any files that are attached to the calendar event (i.e., a PDF document).

12 **Events:**

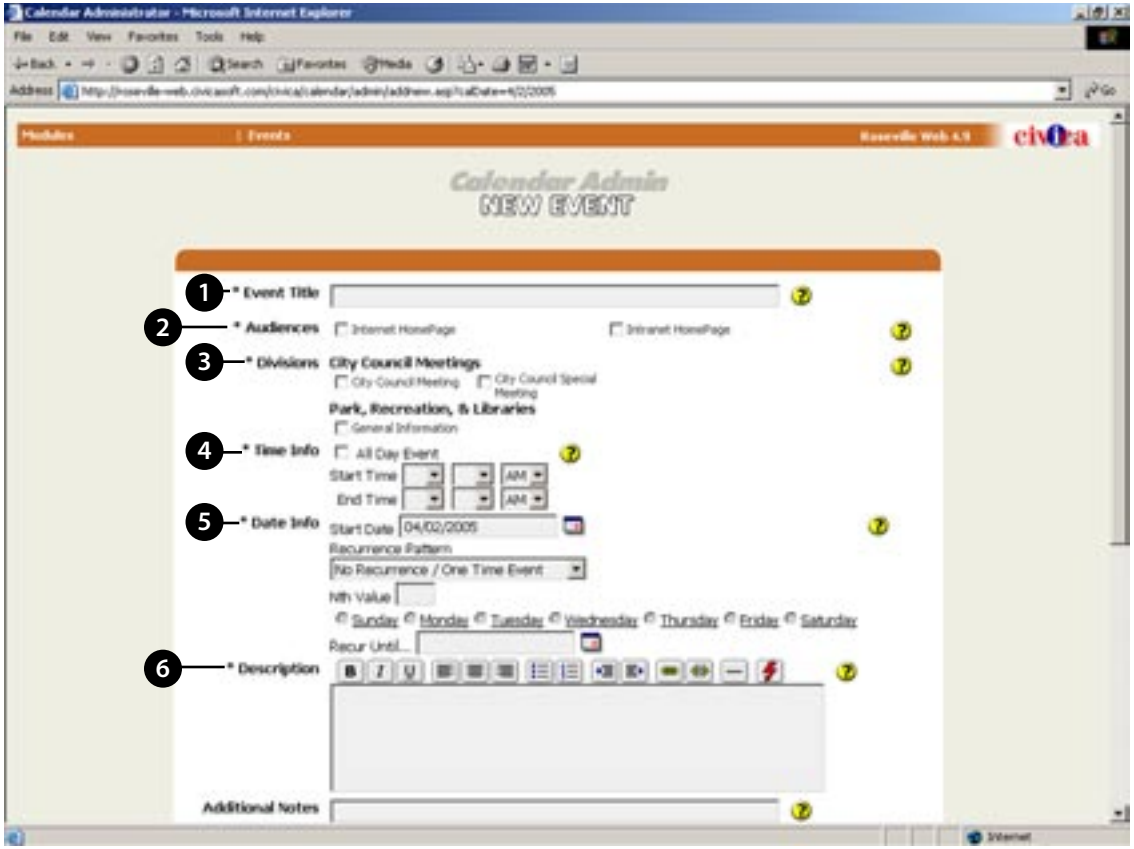
List All: This lists all the calendar events for today's date.

Add New Entry: This takes you to the Add New Events page.



CALENDAR

NEW EVENTS / MODIFY



1. **Event Title:** Enter the name of your calendar event here.

2. **Audiences:** Decide if you want your calendar item viewable by the general public (Internet HomePage), or by City employees only (Intranet HomePage).

3. **Divisions:** Divisions you have access to may be different than this example. Click the division boxes to select which parts of the website you want your calendar entry to be added to.

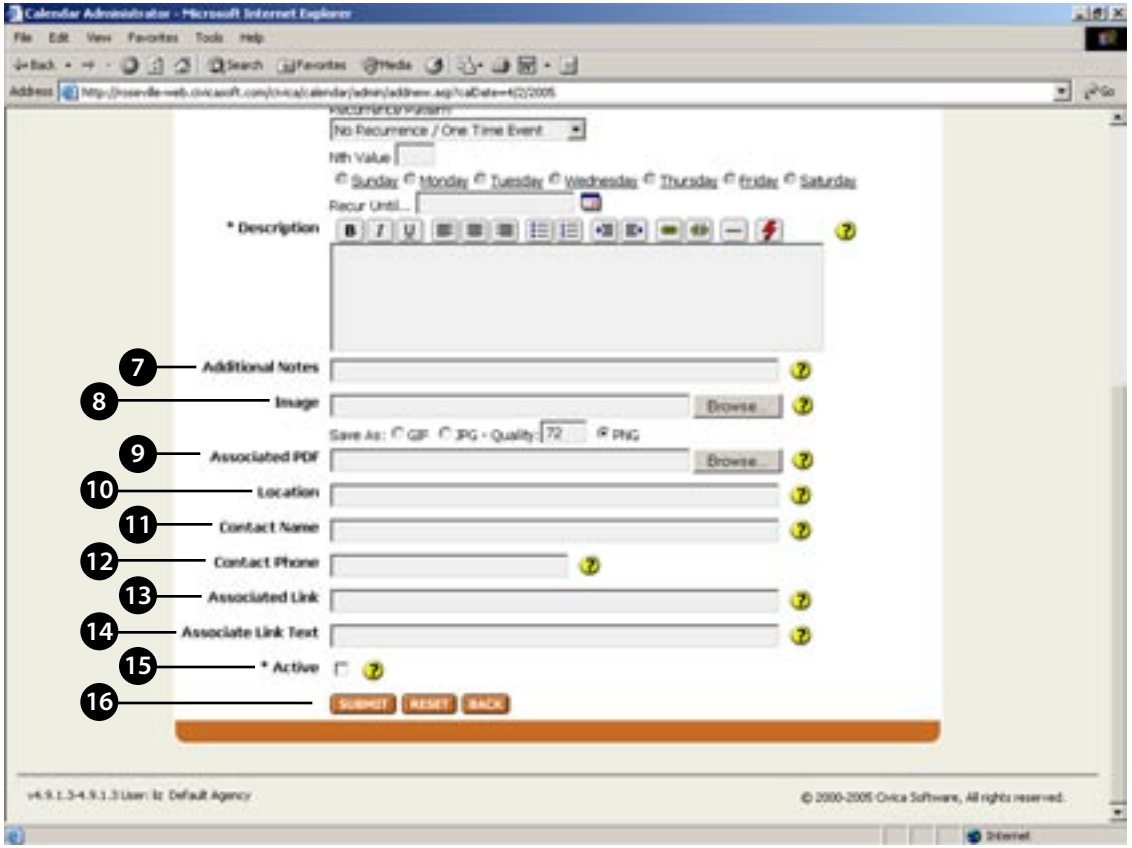
4. **Time Info:** Choose the time your event begins and ends. If this is an all day event (such as observance of a National holiday, etc.) check the "All Day Event" box.

5. **Date Info:** Choose the date that your event begins. If you have a recurring event, choose a selection in the "Recurrence Pattern" dropdown list. 'Nth' basically is variable for 4th, 5th, 6th etc where 'N' is the numerical value. Choose the days of the week the event can occur on? Set the Recur Until date to set a date when this calendar item will end.

6. **Description:** Give all the details about your calendar event here. You can format your event details by applying bold, underline, or italic text styles. You can choose to left, center, or right align your text. Bullets, numbers, indents, and web links can be added here as well.

CALENDAR

NEW EVENTS / MODIFY... CONTINUED



7 **Additional Notes:** Add any simple additional notes specific to your event here.

8 **Image:** Use this field to upload images specific to your event. In the "Save As" area, select whether you want your image to be a JPG, GIF, or PNG. (Hint: JPG's are good for photos, and GIF's are good for text-based graphics that do not have many colors.) Always leave the Quality at 72.

9 **Associated PDF:** Upload a PDF file that is associated with this event to give the viewer additional information or supporting materials.

10 **Location:** Enter details about where the event will take place.

11 **Contact Name:** Enter the name of the main contact for this event.

12 **Contact Phone:** Enter the phone number for the main contact (remember the area code).

13 **Associated Link:** Enter the full URL of any associated web link for the event.

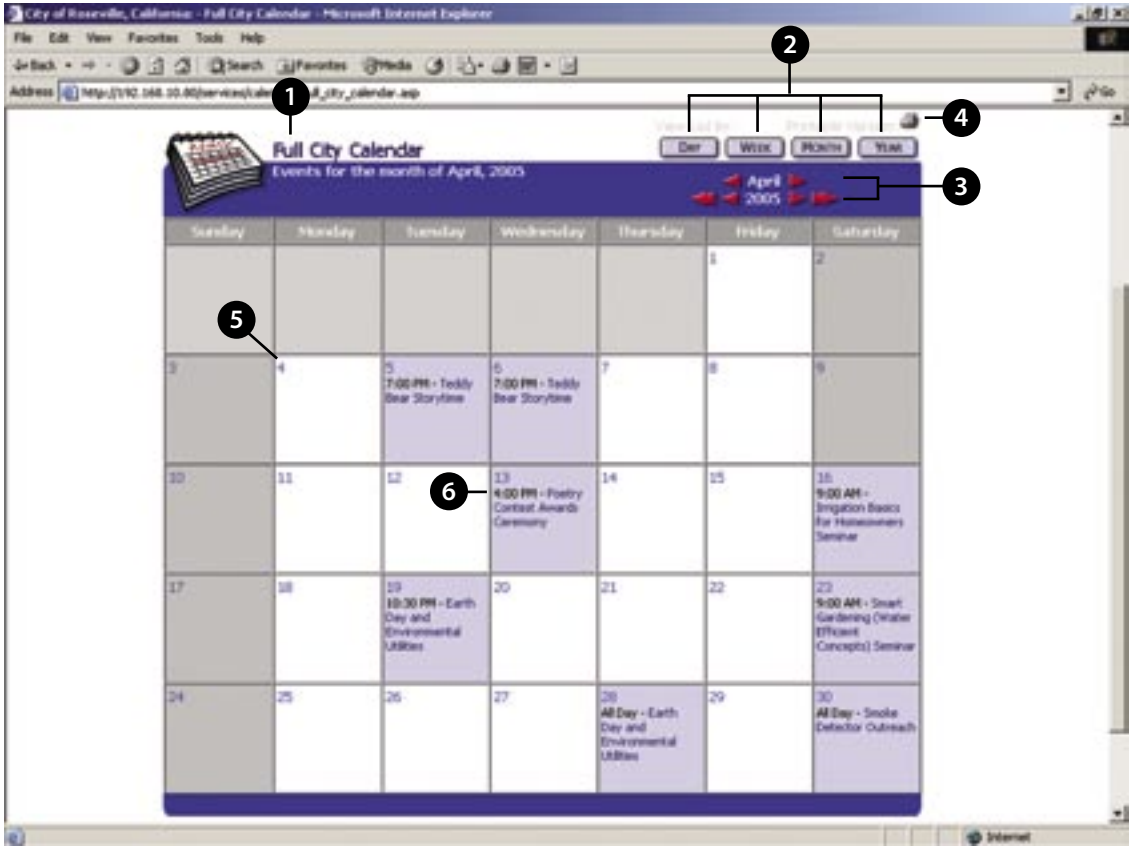
14 **Associated Link Text:** Enter the text for the associated web link.

15 **Active:** Check toggle to change status. If checked, the event will be displayed to the viewer. If unchecked the event will be hidden.

16 **Submit / Reset / Back:** Submit will update the calendar event. Reset will bring you back to a blank "Add New Entry" form. Back will exit you back to the main page without saving your calendar information.

CALENDAR

WITHIN THE WEB BROWSER: CALENDAR



1. **Calendar Name:** You will know which calendar you are looking at by the name here.

2. **View List By:** This will show you all of the calendar items for a particular day, week, and month. "Year" will give you an overview for the entire year, with the highlighted days being the ones with activities. ("Month" is the default view.)

3. **Month and Year:** Use these arrows to view future and previous month's calendars. Do the same for the year. (The double arrows move you ten years.)

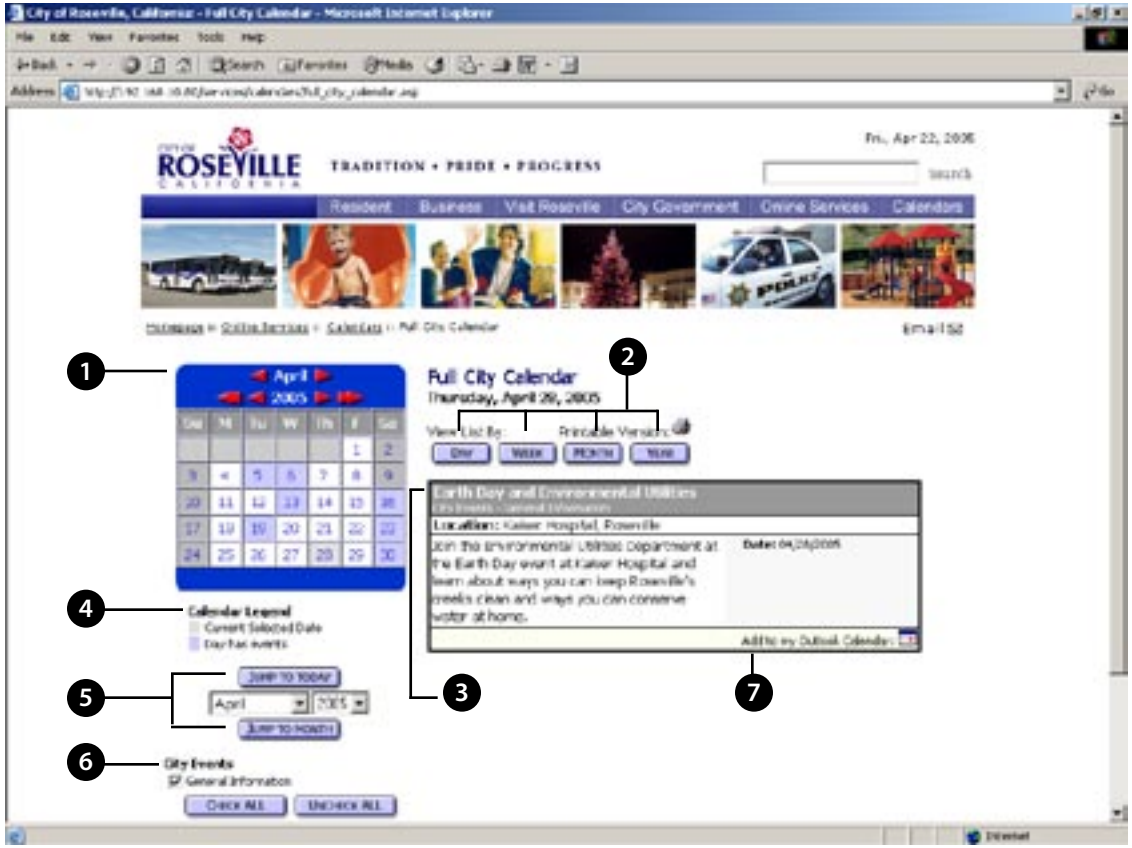
4. **Print:** Click this button to view a printable version of the calendar.

5. **Specific Day:** Each day of the month is clickable, and will show you all of the activities scheduled for that day.

6. **Event:** All events are clickable to view more information.

CALENDAR

WITHIN THE WEB BROWSER: SPECIFIC EVENT



1. **Mini-Calendar:** This is a scaled-down version of the larger calendar view, but is still fully functional. You can click through the month and year using the arrows. You can also click on specific days for more information.

2. **View List By:** This is the same as the main calendar page. Refine your view with these tools.

3. **Today's Activities:** This is where the day's activities will be listed. This area will provide a title, a location, and description of the event.

4. **Calendar Legend:** These color codes help determine which days of the month have scheduled events.

5. **Jump to Today/Month:** Easily jump to a specific month and year that you want to see information for.

6. **City Events:** Search for specific types of Calendar events by category.

7. **Add to my Outlook Calendar:** Click this area to get the event added to your Microsoft Office Calendar automatically. (It works! I tried it!)

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E-zine Module Instructions

The E-zines module allows the user to send out emails and alerts to individuals or groups that have either signed up or have been added to a specific group. This allows the City to communicate with a large body of people, through a ‘Group’ system that the user can employ and manage. The following instructions are designed to outline this modules capability and to offer instructions on how to assign and communicate using the E-zines module.

EZINE TABLE OF CONTENTS

Create and Manage E-Zines 3
Getting Started
Subject
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Sent On
Modify
Send
Send E-zine
Delete

Add New Outgoing E-zines 4
Subject
Text E-Mail
Submit

Add New User List 5
Title
Description
Categories
List is Public
Active
Submit
Cancel

Manage User Lists: 6
Add New Entry
Title
Description
Public
Active
Modify
Users
Delete

E-ZINES

GETTING STARTED

1 Log in to the Administration System using your assigned password. Roll over the Modules tab in the top left corner, select and click eZines.

2 CREATE AND MANAGE E-ZINES

The E-Zine module has four dropdown lists:

Manage Outgoing E-zines:

This is where you modify, send, and delete ezines.

Add New Outgoing E-zines:

This is where you add a new ezine.

Manage User Lists:

This allows someone to manage the email lists.

Add New User List:

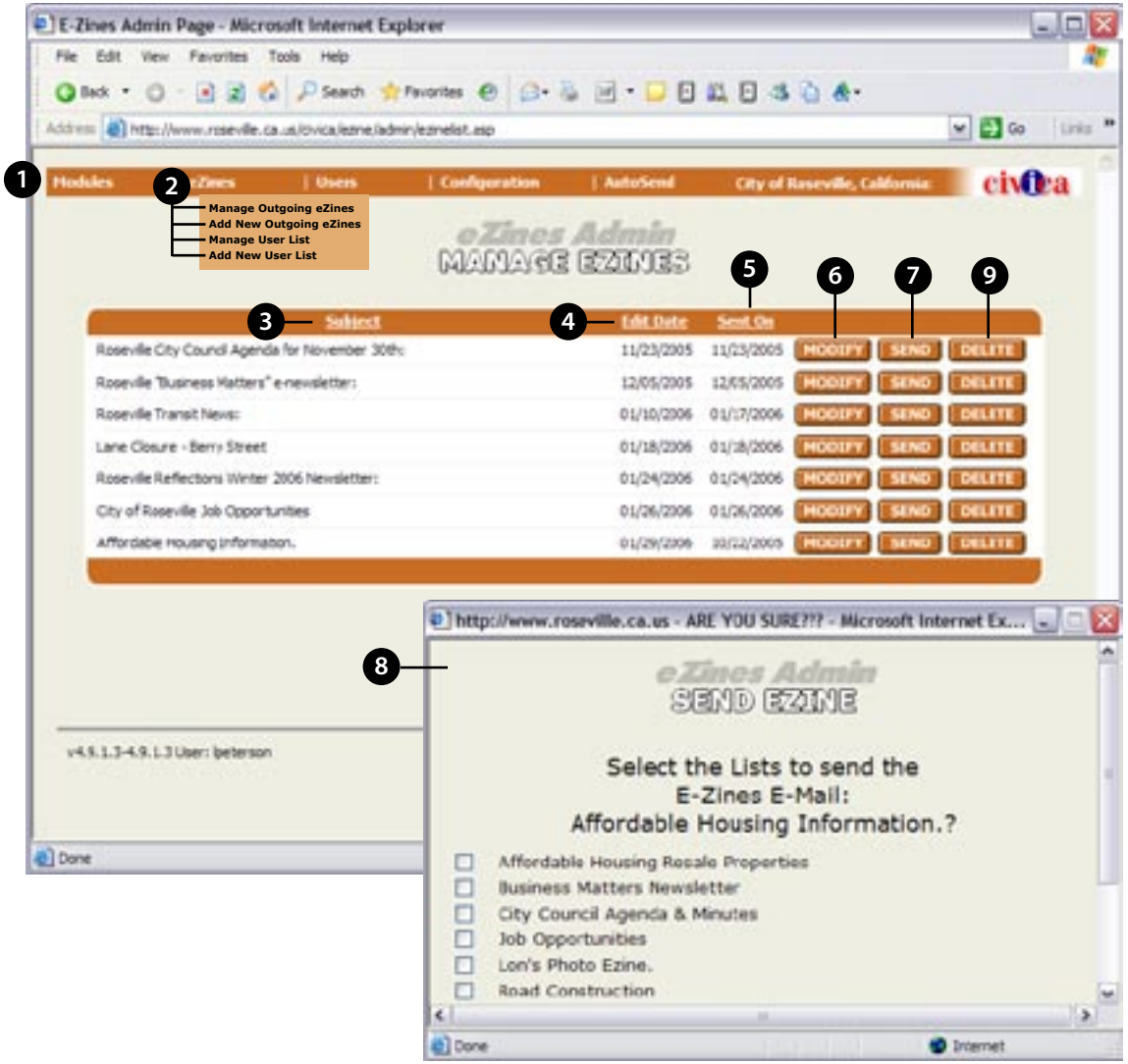
This allows the you to add a new email list to an E-zine.

3 **Subject:** This is the text what will go in the subject line of the email that is sent out.

4 **Edit Date:** This date is generated when the E-zine is either created or updated.

5 **Sent On:** This date is generated when the E-zine is last sent. If the E-zine has not been sent, it will say "Unsent".

6 **Modify:** Click this button to modify an existing E-zine.



7 **Send:** Click this button to send out a particular E-zine.

8 **Send E-zine:** Once you click the Send button a pop-up window will appear (see example above). Select the appropriate list/s you wish to send out a particular E-zine to and click "Send".

9 **Delete:** Click this button to delete a specific E-zine.

E-ZINES

ADD NEW OUTGOING E-ZINE

Contact the site administrator to setup add new users, setup user lists, or blacklists. In addition, your site administrator can setup an E-zine to auto send emails when Press Releases are created, a file is added to the FileBank, or a new job is added to the Jobs Database.

1. **Add New Outgoing E-zines:** Roll over the eZines link and select the Add New Outgoing eZine option.

2. **Subject:** Enter the Subject of the e-Zine entry.

3. **Text E-Mail:** Enter the Text you wish to appear in the email.

4. **Submit:** Click the Submit button to send the eZine to the system. When the system asks you whether you want to send the entry to the site click "Ok". The new eZine will be automatically available on the in the E-zine Admin page, and can be sent to any E-zine list.

E-ZINES

ADD NEW USER LIST

1. **Add New User List:** Roll over the eZines Button and select the Add New list option.

2. **Title:** Enter the Title of the e-Notify list.

3. **Description:** Enter the Description of the entry.

4. **Categories:** Select the category for the E-zine. Contact your system administrator to create additional categories. Categories are used to separate E-zines into different sections online.

5. **List is Public:** Click the List is Public button, if you want the list be be made available online to the public.

6. **Active:** Check the Active box, if approved, to make the release live online.

7. **Submit:** Click the Submit button to send the list to the system. When the system asks you whether you want to send the entry to the site click "Ok". If the active box is checked, the E-Zine will be automatically available on the site.

8. **Cancel:** To cancel creating a new list, click the Cancel button.

E-ZINES

MANAGE USER LISTS:

1. Roll over the eZines Button and select the Manage lists option. Select the entry you wish to modify and click on the Modify button. Follow same procedures as if you were making a new list.Click the Submit button to send the revised list to the system. When the system asks you whether you want to send the entry to the site click "Ok".

2. **Add New Entry:** See the Add New User List instructions on the previous page for more information.

3. **Title:** This is the title of the E-zine list.

4. **Description:** This is the Description of the entry.

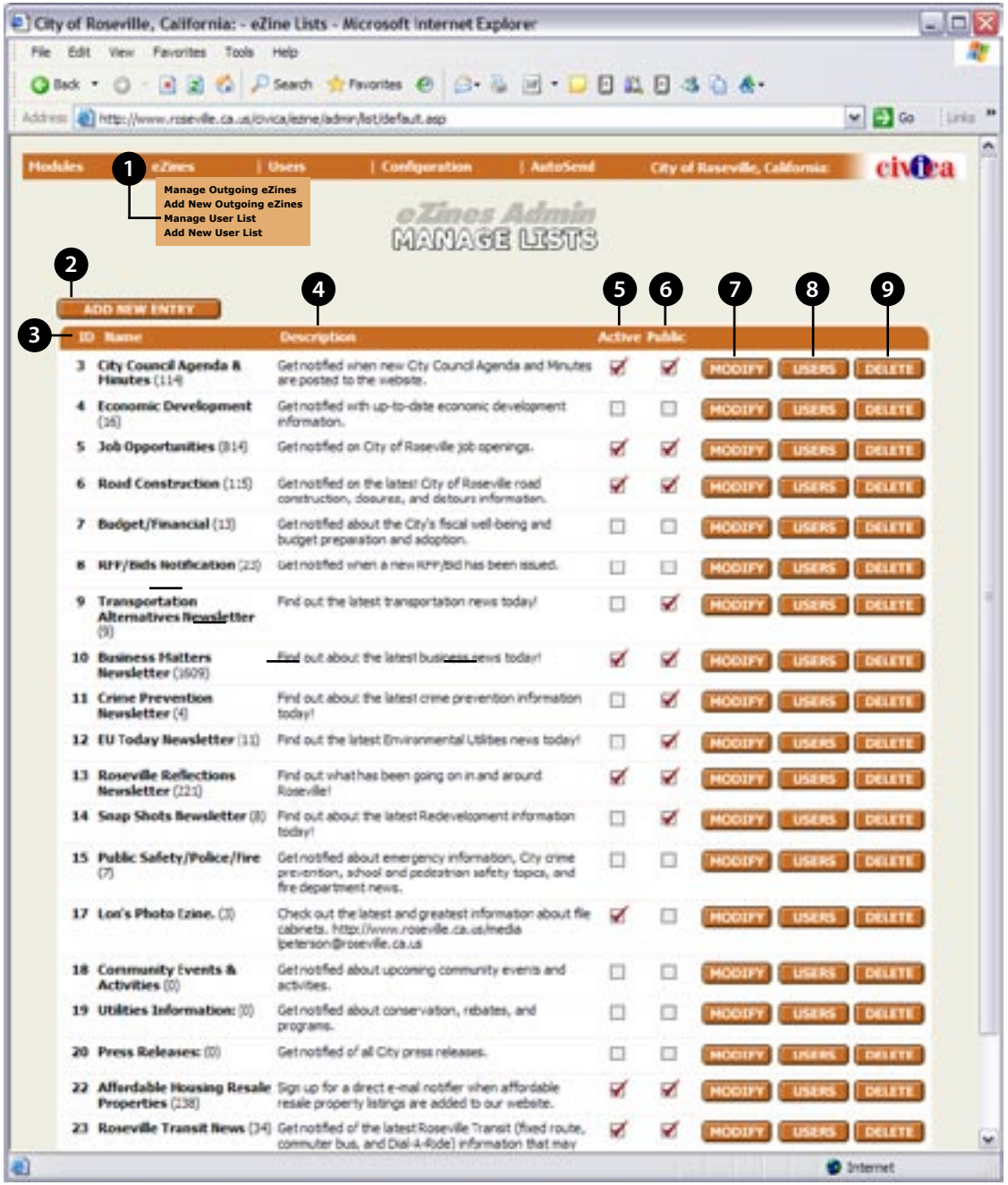
5. **Public:** If the box is checked, then the List is made available online to the public.

6. **Active:** If the box is check, then the List is active.

7. **Modify:** See Add New User List instructions on the previous page for more information on how to modify a List.

8. **Users:** Click this button to view the users signed up to the List. You can remove users from the list by selecting the name and clicking the "Remove" button.

9. **Delete:** Click this button if you want to delete a List.



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FAQs Module Instructions

The FAQ Module allows the user to post frequently asked questions on their site categorized by various topics while supplying answers to each. It also allows for HTML links and PDF's to be attached to each answer should additional information be available or needed. The following sections demonstrate how to post questions and answers to the FAQ module, edit existing FAQ's and assign links and PDF's to each.

FAQ TABLE OF CONTENTS

Manage Entry 3
Faqs Dropdown Menu
Add New Entry
Filter By Category
Filter By Assigned
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Category / Question / Answer / Active
Modify
Preview
Delete

New Entry 4
Question Type
Category
Assigned To
Language
Question
Answer

New Entry ... continued 5
URL Link text
Map Active
Map Link Text
Address
Address cont.
City
State
Zip
Telephone
Fax
PDF
PDF Link Text
Active
Submit
Back

FAQ

MANAGE ENTRY

1. **Faqs Dropdown Menu:** Underneath the FAQ dropdown menu you will find two options.
   List All will show you the complete list of Frequently Asked Questions that you have on your site.
   Add New Faq will take you to the FAQ Admin page where you can create a new entry.

2. **Add New Entry:** You can easily create a new FAQ by clicking this button.

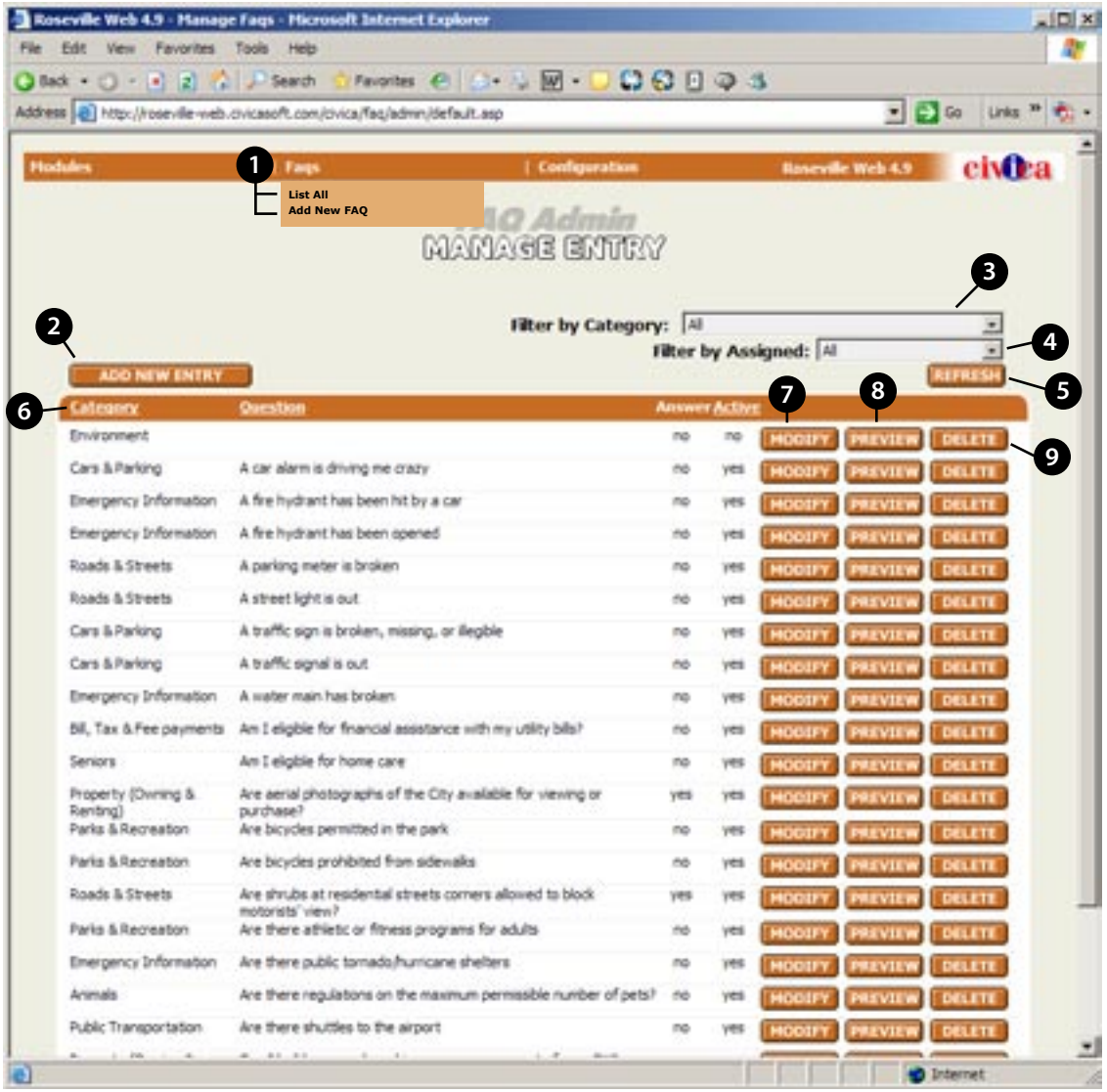
3. **Filter By Category:** Choose a specific FAQ category that you want to view here.

4. **Filter By Assigned:** Choose an option from this list if you want to view FAQs from a particular City department.

5. **Refresh:** Click Refresh to make your Filter selection activate.

6. **Category / Question / Answer / Active:** These headings across the top of the FAQ list helps to organize the content below by the Category they are assigned to, what the specific question is, if the question has a provided answer, and if the question is active.

7. **Modify:** Choose this option if you wish to edit an existing FAQ.

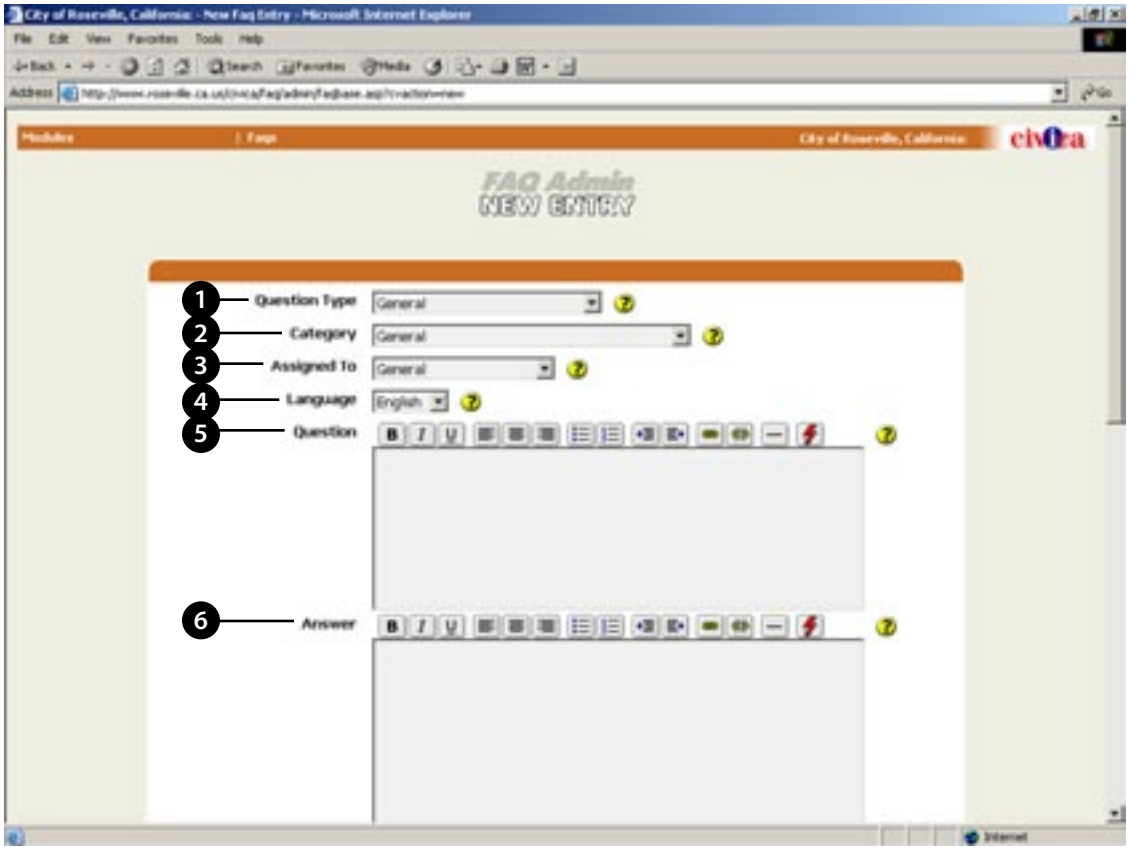


8. **Preview:** Click this button to see a preview of a particular FAQ.

9. **Delete:** Click this button to delete a specific FAQ.

FAQ

NEW ENTRY



1. **Question Type:** You can specify a question structure type here.

2. **Category:** Choose the category for the question here.

3. **Assigned To:** Pick a specific department this question is associated with.

4. **Language:** Choose English.

5. **Question:** Type out your specific question in this box. You can format the look of your question by using some of the formatting options that are at the top of this area. (From left to right: bold, italics, underline, left aligned, center aligned, right aligned, bullets, numbering, indent left, indent right, create link, delete link, horizontal line, remove formatting.

6. **Answer:** Type the answer to your Frequently Asked Question in this box. You can also use the formatting tools at top of this area to enhance your answer.

FAQ

NEW ENTRY... CONTINUED

7 **URL:** If providing a link to a website will help add to your Question's answer, type the address of the website here.

8 **URL Link Text:** Enter the URL link text as you want it to be displayed.

9 **Map Active:** Check to add map icon to page. If checked, specify the full address in the Address fields below.

10 **Map Link Text:** Enter the Map link text as you want it to be displayed.

11 **Address:** Enter the first line of the address for the map.

12 **Address cont.:** Enter the second line of the address for the map.

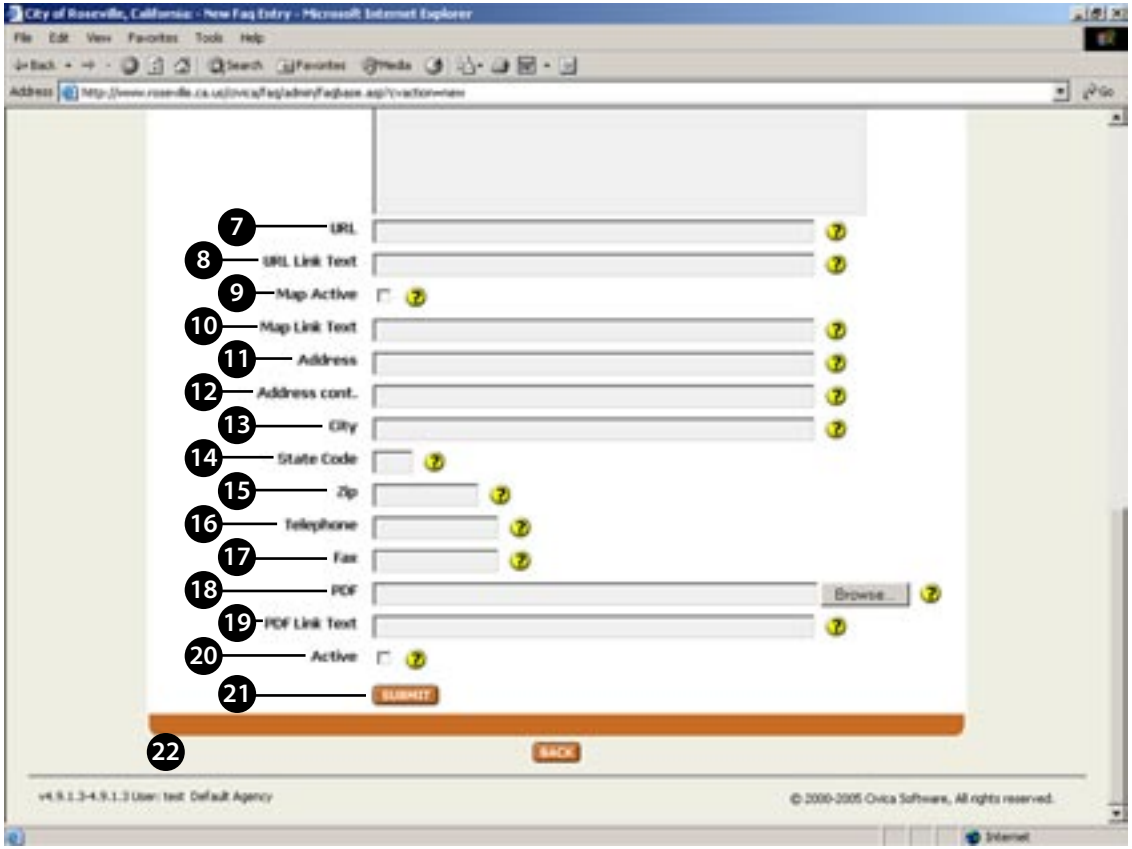
13 **City:** Enter the name of the city for the map address.

14 **State:** Enter the state code for the map address.

15 **Zip:** Enter the zip code for the map address.

16 **Telephone:** If there is a phone number associated with your question, enter it here.

17 **Fax:** Enter the fax number here.



18 **PDF:** Select a PDF file for upload if it relates to your FAQ.

19 **PDF Link Text:** Enter the PDF link text as you want it to be displayed.

20 **Active:** Check to make the question active; uncheck to hide from the visitors.

21 **Submit:** Click this button to submit the FAQ to the database.

22 **Back:** Go back to the previous page without saving the FAQ.

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FileBank Module Instructions

The FileBank module allows the user to organize and store files that relate to their organization and web-site. Within the module users or groups can be pointed to files stored here for easier access. Due to the organizational structure of Folders and Sub-folders, users are able to actively maintain their content and share it with internal staff or third parties. The following sections demonstrate how to upload a file to the FileBank module, edit existing files and how to generate and create folders and their sub-folders.

FILEBANK TABLE OF CONTENTS

Manage Files 3
MangeFiles
Manage Folders
File Search
Folder List
Sort By

Manage Files Expanded..... 4
Folder List (Expanded)
Subfolders
Now Viewing
Upload
Edit Info
Move / Delete / View

Manage Folders 5
Manage Folders
Add New Folder
Add New Subfolder
Move Selected Folder
Delete Selected Folder
Modify / Rename Selected Folder
New Folder
Modify Existing Folder

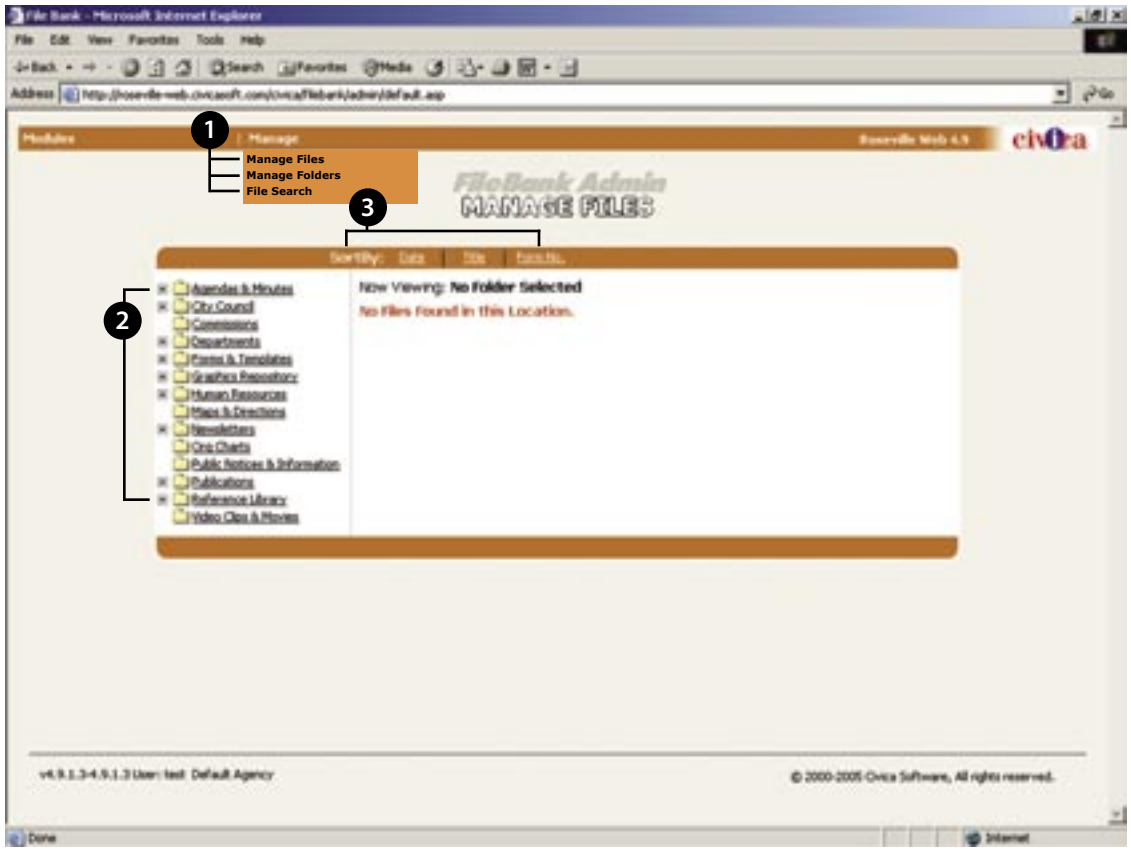
New File / Modify File 6
New File / Modify File
Help Question Marks
Title
SubTitle
Document Number
File Upload
Instruction File Upload
Revision Date
File Description
File Keywords

New File / Modify File... continued 7
Language
Classification
Department
Type of Document
Type of Image
If File Active?
Submit / Reset / Back

File Search 8
File Search
Enter BlobID
Enter BlobID (result)
The file is named
The file is located in the following directory
Insert Civica

FILEBANK

MANAGE FILES



1. **Manage Files :** This shows the file structure and the files within the folder that are in the database.
   Manage Folders : Lets you organize the folders in your Filebank.
   File Search: This lets you search the database for the files by the BlobID.

2. **Folder List:** This is the list of main file folders on the website. Click the "+" signs to expand the list, and click the "-" signs to shrink the list.

3. **Sort By:** Choose to sort and view files by Date, Title or Form No.

FILEBANK

MANAGE FILES: EXPANDED

1. **Folder List (Expanded):** This is what the folder list looks like once you have clicked a "+" sign.

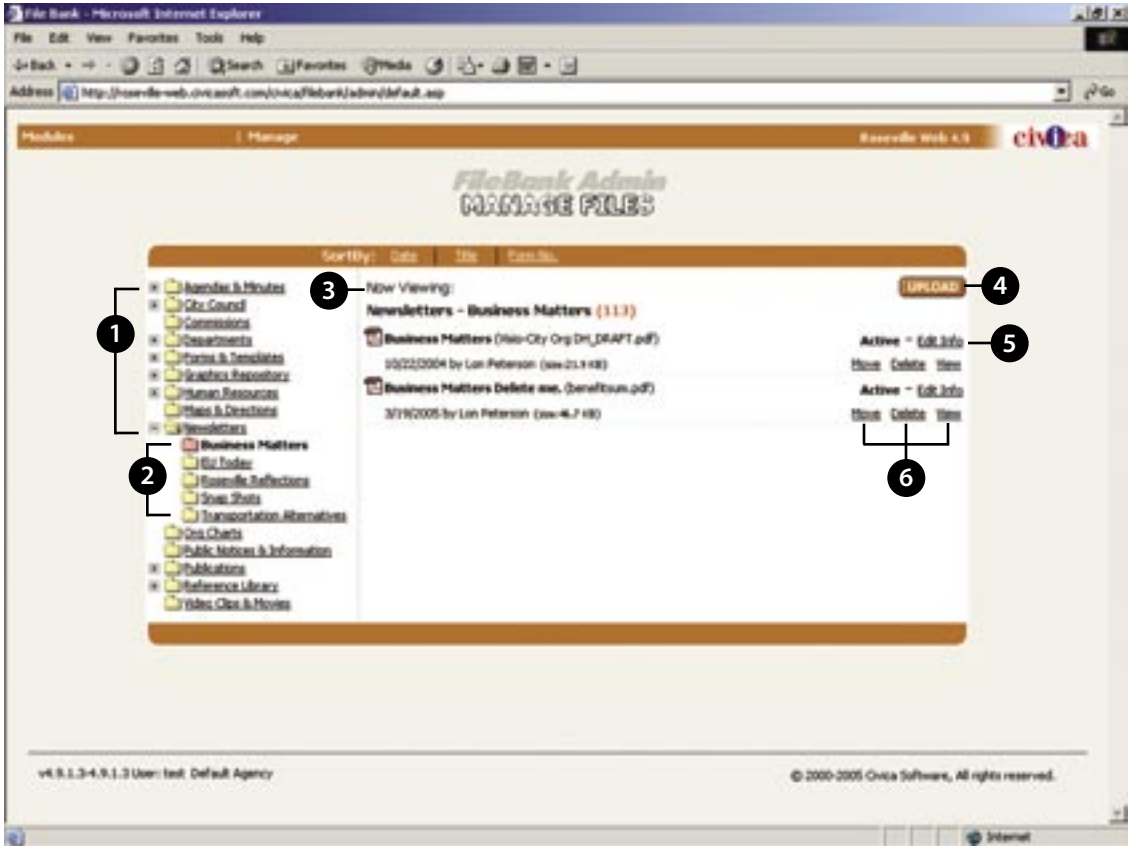
2. **Subfolders:** Folders are contained inside other folders, a lot like how the folder system works on your computer.

3. **Now Viewing:** In this example we clicked on "Business Matters," and we now see the files inside the folder and their details.

4. **Upload:** Click this button and you can upload a brand new file.

5. **Edit Info:** Edit the existing file information.

6. **Move / Delete / View:** Move a file to a new folder, delete it, or view it.



FILEBANK

MANAGE FOLDERS

1. **Manage Folders:** In this part of the Filebank you can add new folders, create subfolders, and move, delete or modify existing folders.

   a.) Add New Root Folder: Create a main folder.

   b.) Add New Subfolder: Create a SubFolder folder.

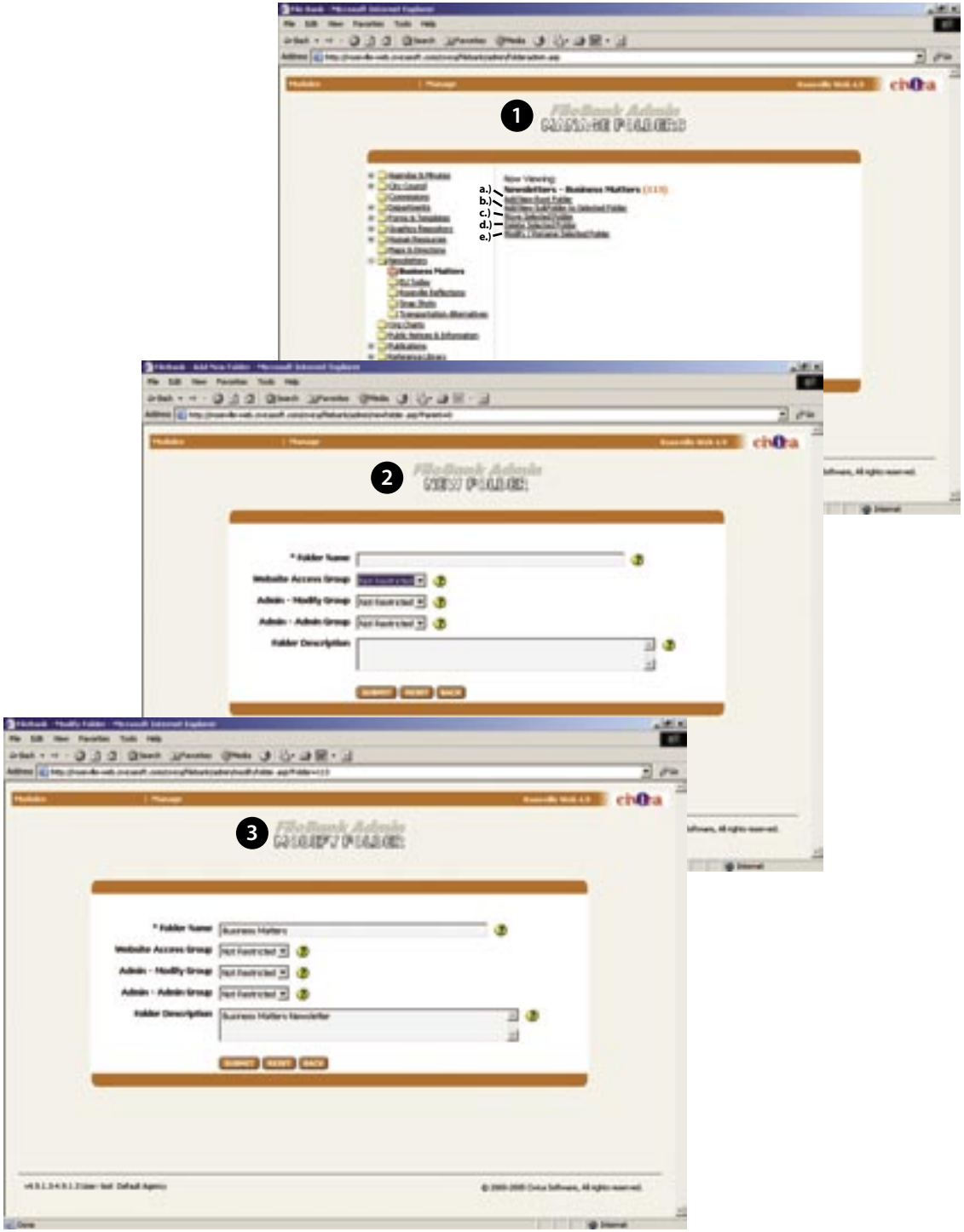
   c.) Move Selected Folder: Move a specific folder within another folder.

   d.) Delete Selected Folder: Delete a specific folder.

   e.) Modify / Rename Selected Folder: Modify an existing folder or properties previously assigned. In addition, you can also reassign property values to a folder.

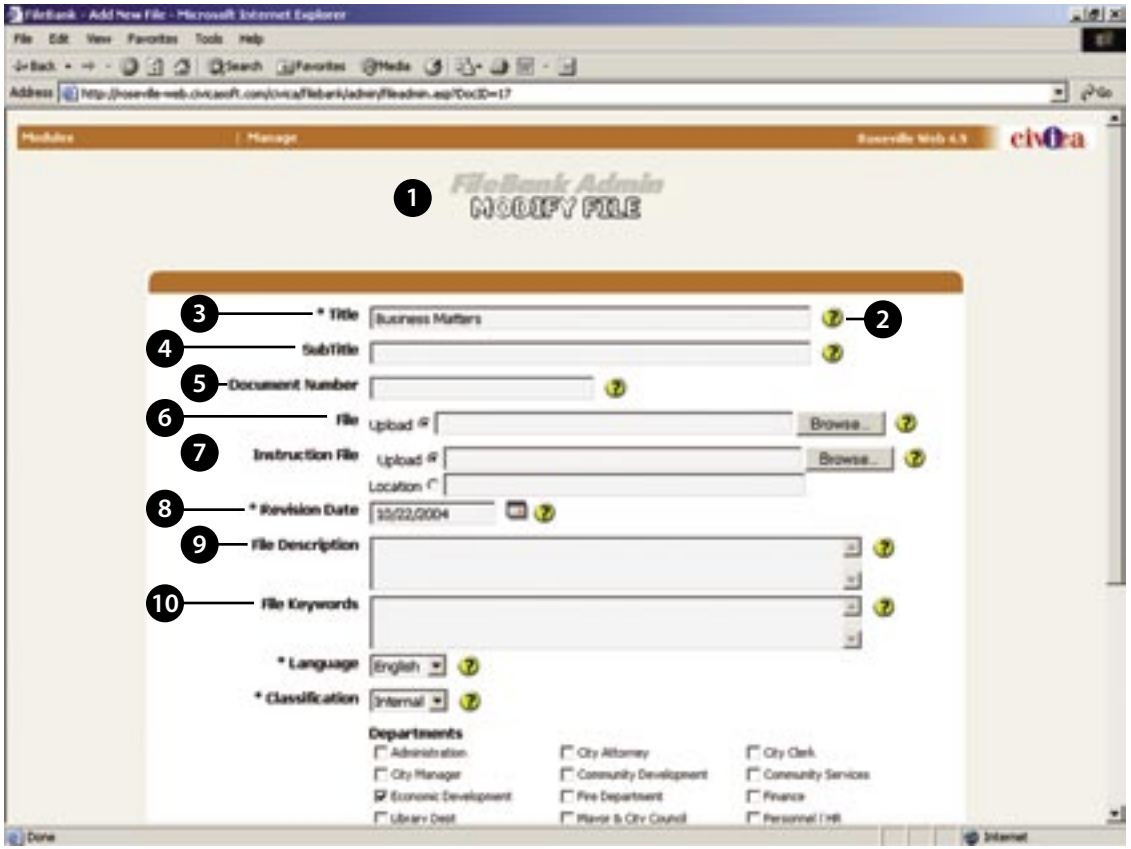
2. **New Folder:** When you create a new folder, be sure to give it a name and specify where to access the folder from the website.

3. **Modify Existing Folder:** You can also modify folders that already exist. You can rename and reassign who will access these folders.



FILEBANK

NEW FILE / MODIFY FILE



1 **New File / Modify File:** When you click to "UPLOAD" a new file, or to "Edit Info" on an existing file (See example to right; in this example we are Modifying a file.).

2 **Helper Question Marks:** If you ever have a question about what each field in the form is for, hover over the Question Mark icon to the right and it will give you an explanation.

3 **Title:** Enter the name of the file here.

4 **SubTitle:** This is just in case you need it.

5 **Document Number:** Leave blank, it will be automatically assigned once you create a new file.

6 **File Upload:** Browser your computer for the file you want to upload to the FileBank.

7 **Instruction FIle Upload:** Upload a file with instructions that help explain the first file.

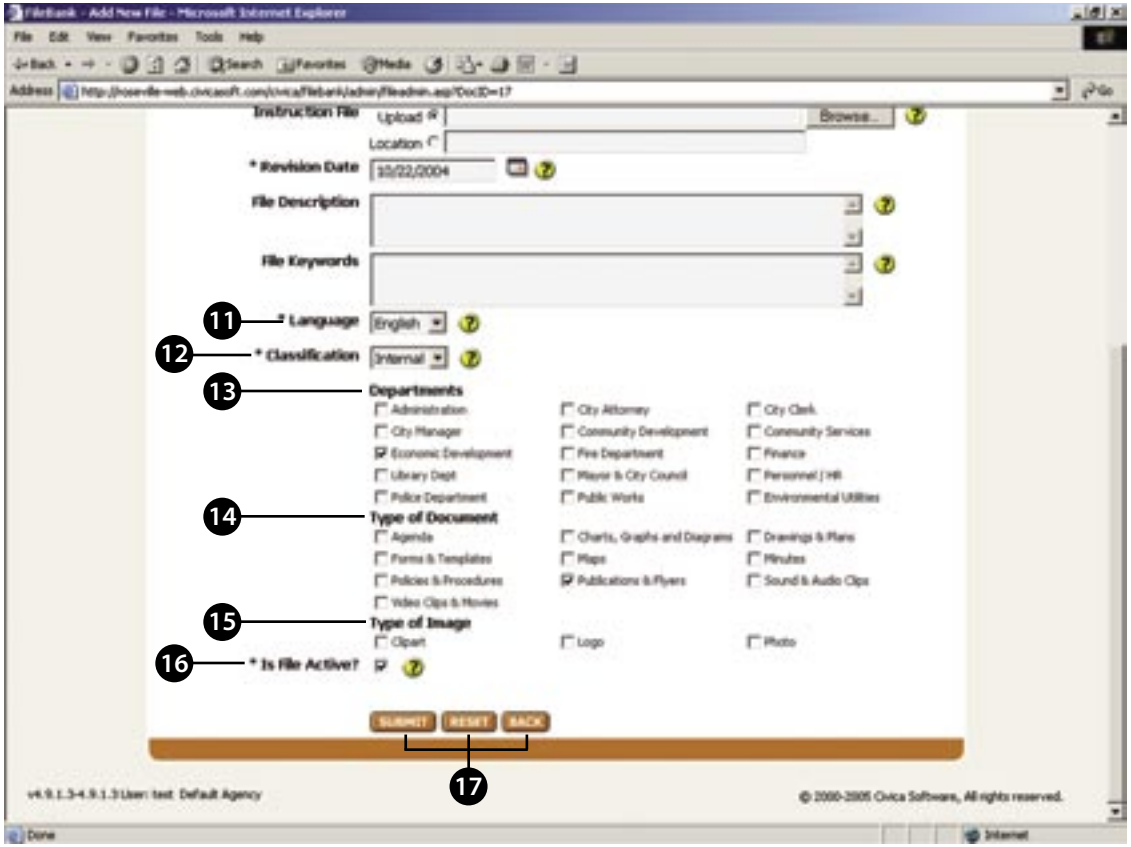
8 **Revision Date:** One of the more important and often over looked fields to fill out is "Revision Date." In this field you should insert the approximate date that your file was created. When files are viewed through the website they are listed in chronological order starting with the newest file first. If you leave this field at its default date the computer will think that the file you are uploading is the newest, which is not always the case.

9 **File Description:** Enter a description of the file being uploaded in to the system.

10 **File Keywords:** Specific words to assist when searching the system for specific files and their content.

FILEBANK

NEW FILE / MODIFY FILE... CONTINUED



11 **Language:** Choose a language from the drop down menu

12 **Classification:** Internal means that it is intended for the Intranet and external means it is intended for the Internet.

13 **Deparment:** Check which City departments will have access to use your file.

14 **Type of Document:** Check which best describes the document you will be uploading.

15 **Type of Image:** Choose the type of image that you are uploading.

16

Is File Active?: Check this box if you want the file visable to viewers.

17

Submit / Reset / Back: Submit will upload the file and description. Reset will reset the form to a new blank form to start over. Back will cancel the changes you have been making and take you back to the Filebank page.

FILEBANK

FILE SEARCH

1. **File Search:** In this part of the Filebank you can search for specific files by their BlobID. A BlobID is the ID of the file that is uploaded into the FileBank.

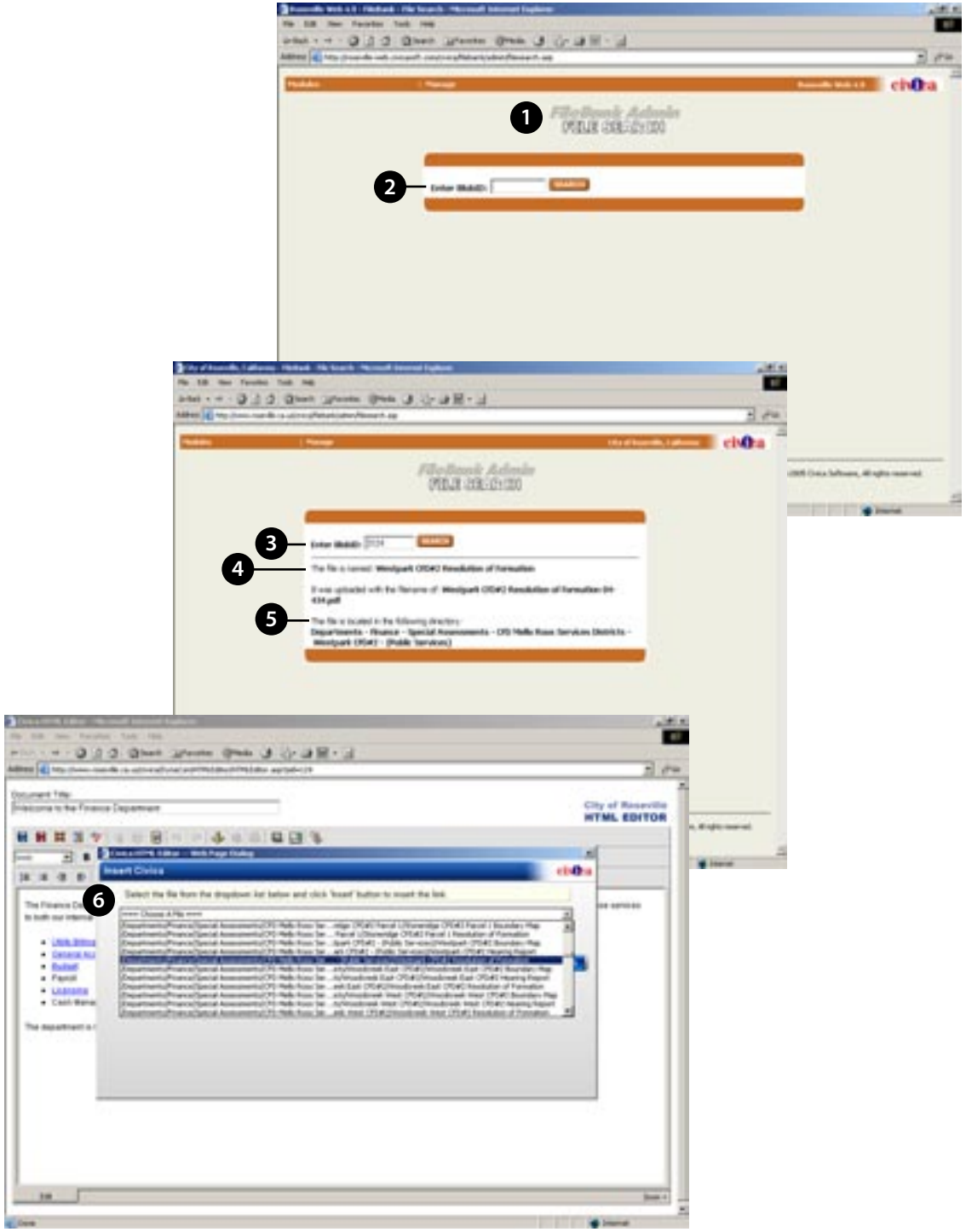
2. **Enter BlobID:** Enter the file's BlobID and you will be able to search the database for the corresponding file. Once you have found this file you can move it to different folders or edit it's content. Click "SEARCH" to find this file.

3. **Enter BlobID (result):** After clicking search the BlobID you searched for should still be in this field.

4. **The file is named:** This area should show you the title that was given to the file.

5. **The file is located in the following directory:** This line should give you the path to find the file you are looking for. In this example the file is located through this path: Departments > Finance > Special Assessments > CFD Mello Roos Services Districts > Westpark CFD#2 - (Public Services).

6. **InsertCivica:** The file search will really help when you are editing a page on the website and you choose to "InsertCivica" (link to a file). Knowing the path of the file will help you find your file in the ginormous drop-down list that the InsertCivica function gives you.



CIVICASOFT

Info Guide Module Instructions

This module allows the user to create, manage and edit information on services throughout the city for the general public. Entries can be posted online for quick referencing by category and topic. The following instructions are designed to outline this modules capability and to offer instructions on how to generate and post 'Info Guide' entries.

INFO GUIDE TABLE OF CONTENTS

Creating InfoGuide Entries 3
Login
Select InfoGuide Module

Manage InfoGuide Entries 4
Add a New Entry
Search
View Alphabetically
Title
Active

Continued: Manage InfoGuide Entries 5
Modify Entry
Preview Entry
Delete Entry
Next

Creating & Modifying Entries 6
Title
Sub Title
Phone
Fax
Info
Text Editor (see page 8)
Keywords

Continued: Creating & Modifying Entries 7
URL
PDF
Image
Save As
Active
Submit
Back

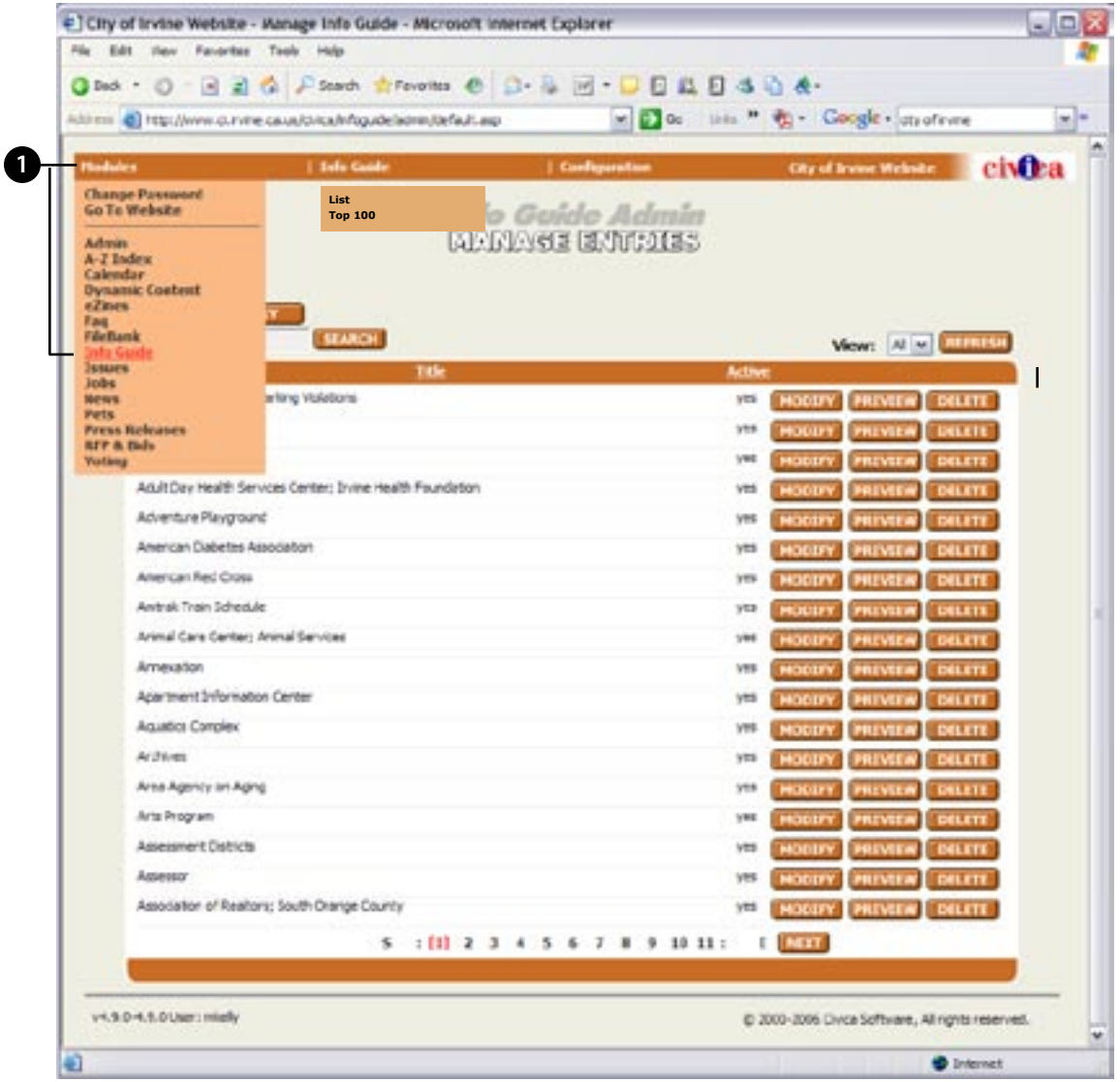
Text Editor 8
Bold
Italic
Underline
Left Aligned
Center Aligned
Right Aligned
Bullet List
Number List
Increase Indent
Decrease Indent
Insert/Edit Link
Remove Link
Horizontal Bar
Type Zapper

INFO GUIDE

CREATING INFOGUIDE ENTRIES

To create an Info Guide entry, log into the Civica Administration System, by going to your website as normal and then adding "/civica/admin" to the URL as shown below… i.e. (http://www.your-online-name-here.com/civica/admin)

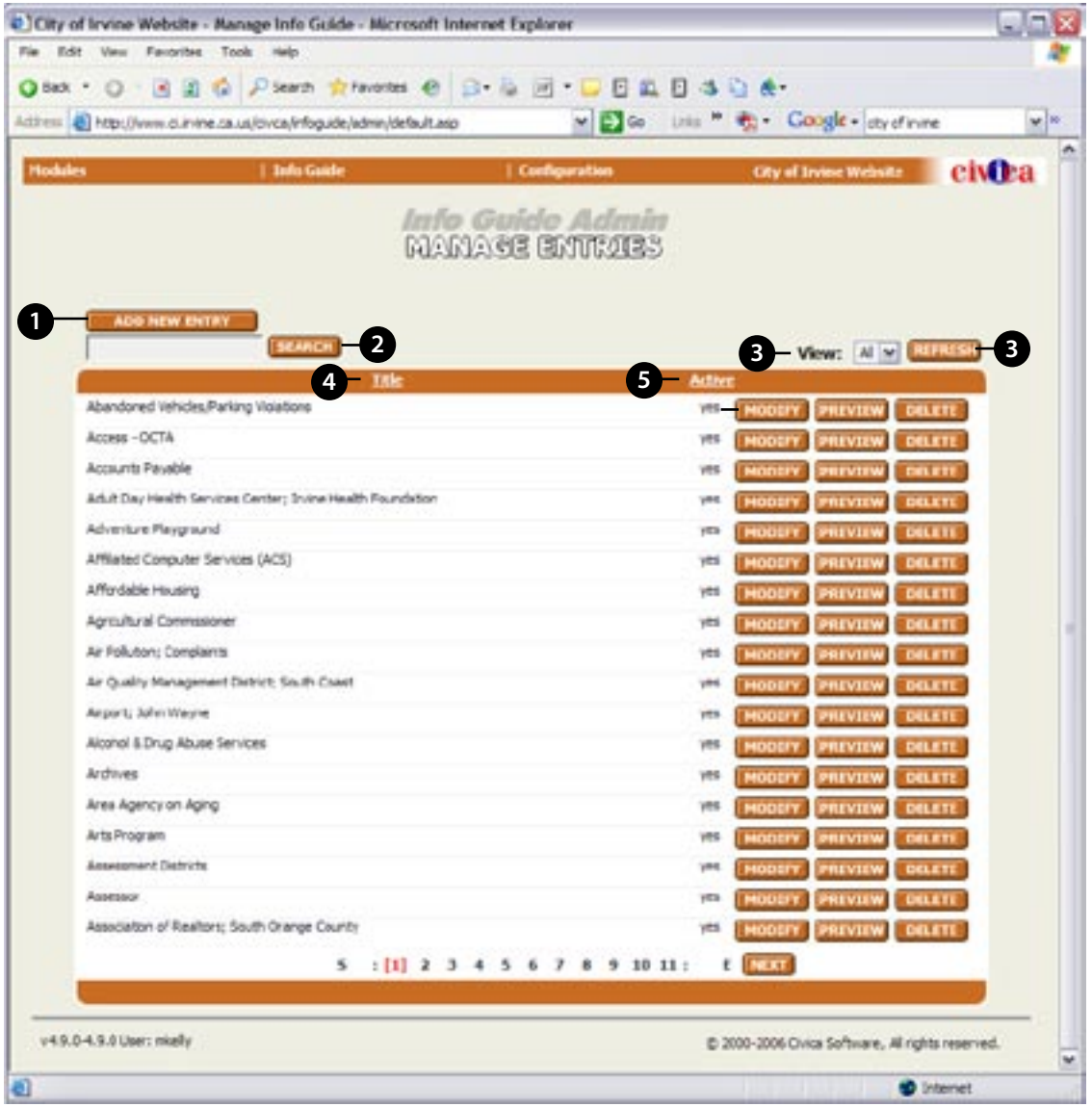
1. Once you have logged in, using your username and password, select the Info Guide module. Info Guide is located at the top of the screen; choose "Modules' then select 'Info Guide' (see example to right).



INFO GUIDE

MANAGE INFO GUIDE ENTRIES

This is where you create and manage all current entries in the Info Guide module.



1. **Add a New Entry:** To add a new entry, click the 'Add New Entry' button (see example to right). This will take you to the entry screen allowing you to add an entry (see next page).

2. **Search**: To use the search feature, type in a word that best fits what you are looking for such as 'commerce' for the if you were searching for the Department of Commerce. By using the view feature, you can search the list of entries alphabetically.

3. **View Alphabetically:** To sort the entires alaphbetically, select from A thru Z on the drop-down menu. Once you have selected a letter to view, click the "Refresh" button.

4. **Title**: This is the title of the Info Guide entry. This is what is searched when trying to find specific data.

5. **Active:** If the Info Guide entry is active it will say "Yes". If it is not active it will say "No".

INFO GUIDE

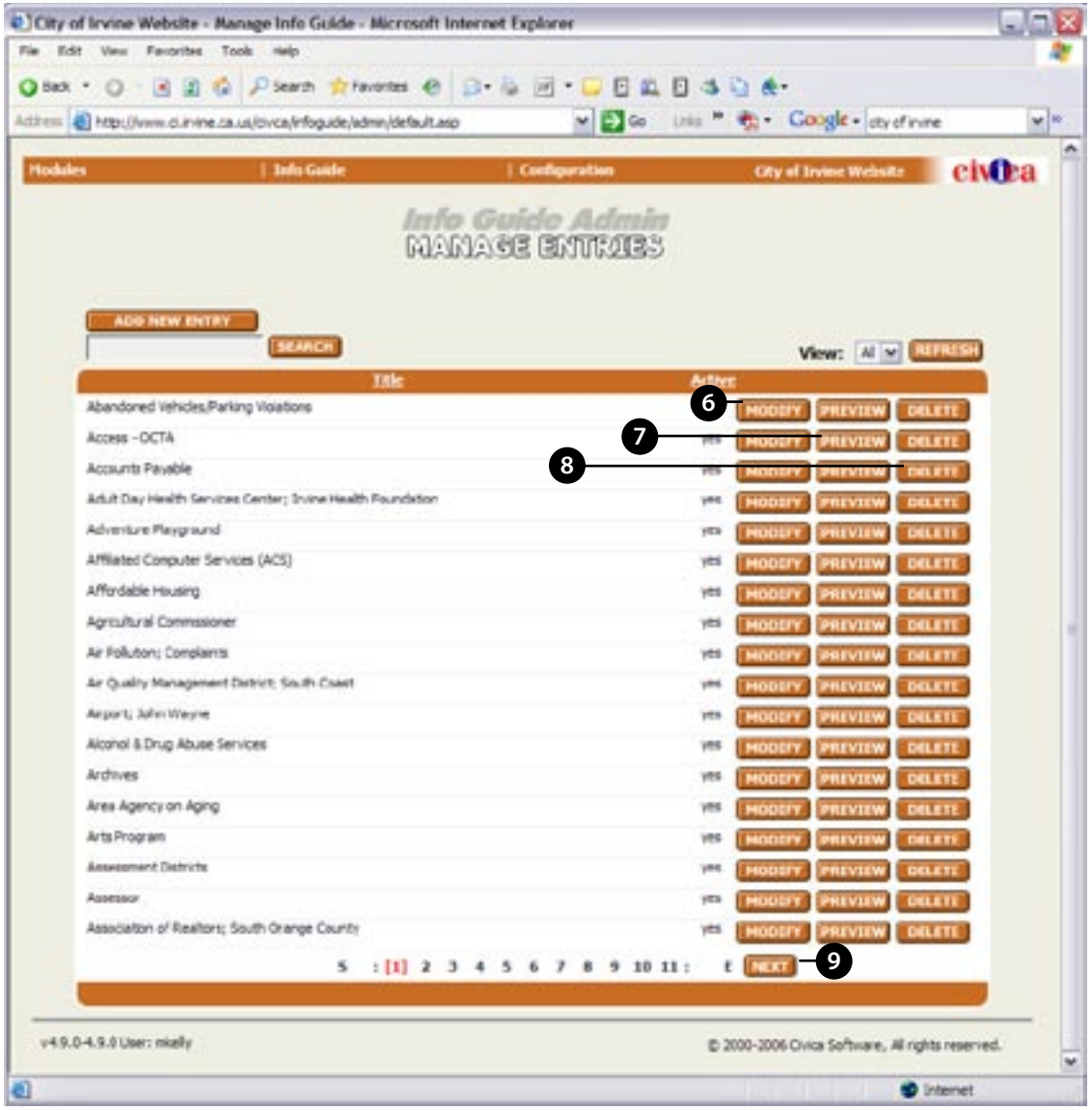
CONTINUED: MANAGE INFO GUIDE ENTRIES

6 **Modify Entry:** To modify an entry click 'Modify' on the same line as the entry you would like to modify; this will take you to the 'Modify Entry' screen (see example on page 6). Make the neccasary changes and then check the 'Active' checkbox and click the 'Submit' button.

7 **Preview Entry:** To preview an entry click 'Preview' on the same line as the entry you would like to preview; this will open a new browser window and display the information.

8 **Delete Entry:** To delete an entry, click 'Delete' on the same line as the entry you would like to delete; this will open up a dialog box asking for final approval prior to deleting the information to ensure that it was your intent to remove the entry.

9 **Next:** As you start to populate the information, this button will allow editors to move through the multiple pages.



INFO GUIDE

CREATING & MODIFYING ENTRIES

To create or modify an entry, follow the numbered steps below and reference the example to the right.

1. **Title**: Enter a title for the entry such as 'Department of Consumer Affairs'. This title will be displayed alphabetically on your city's web-site.

2. **Sub Title**: Enter a sub-title if needed.

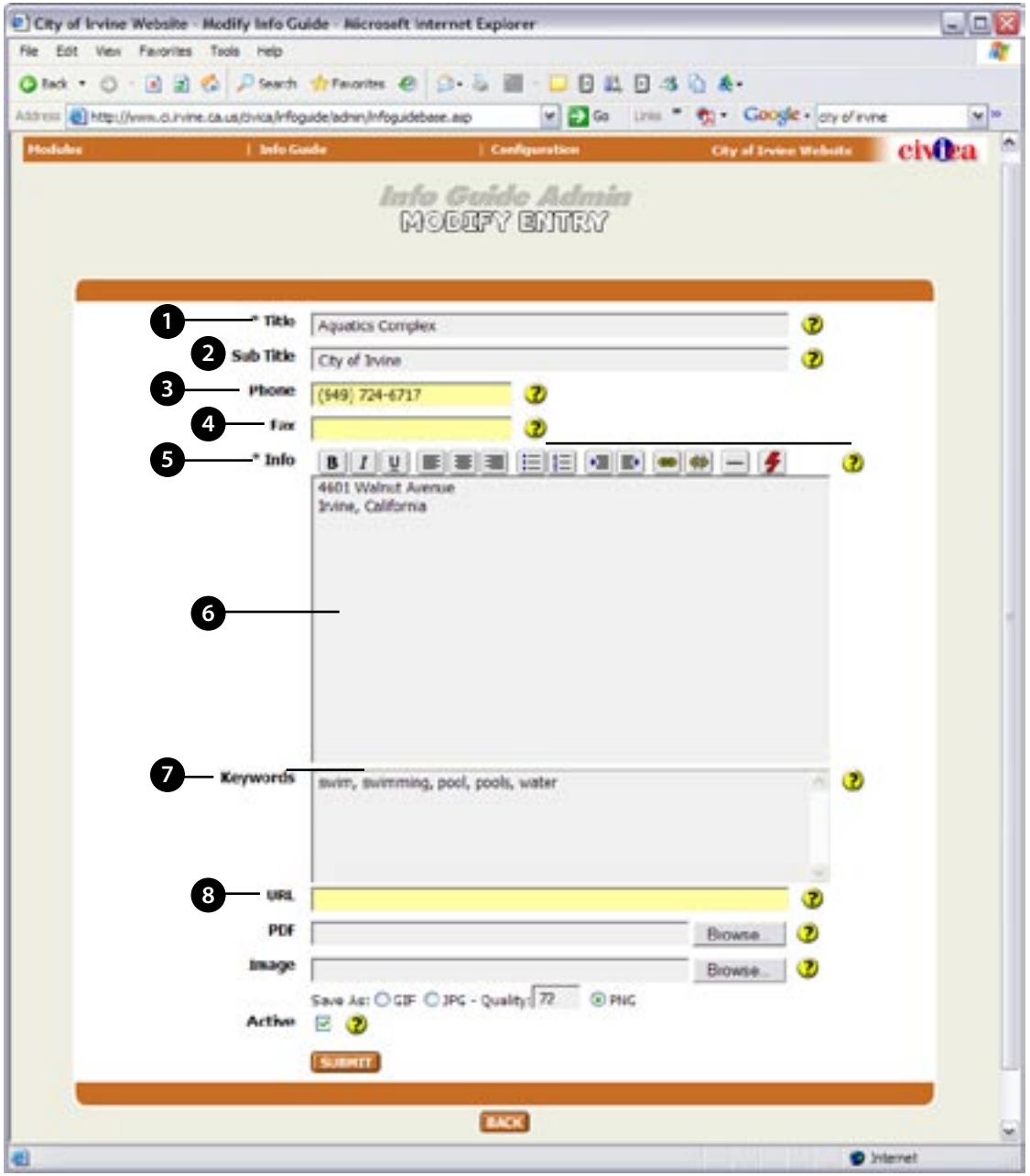
3. **Phone**: Enter the phone number for the entry you are adding. This will be the contact phone number.

4. **Fax**: Enter the fax number for the entry you are adding.

5. **Info**: Enter the text that supports the entry. This could be an address or contact name etc.

6. **InfoGuide Text Editor**: See page 8 for specific details about how to format text and create links.

7. **Keywords**: Enter keywords that can be used for quick referencing, when a search is being performed for the entry.



INFO GUIDE

CONTINUED CREATING & MODIFYING ENTRIES

8 **URL**: If applicable, add a URL (link) to the entry, this could be a department's official web-site or a company's etc.

9 **PDF**: If applicable, add a URL (link) for the entry you are adding.

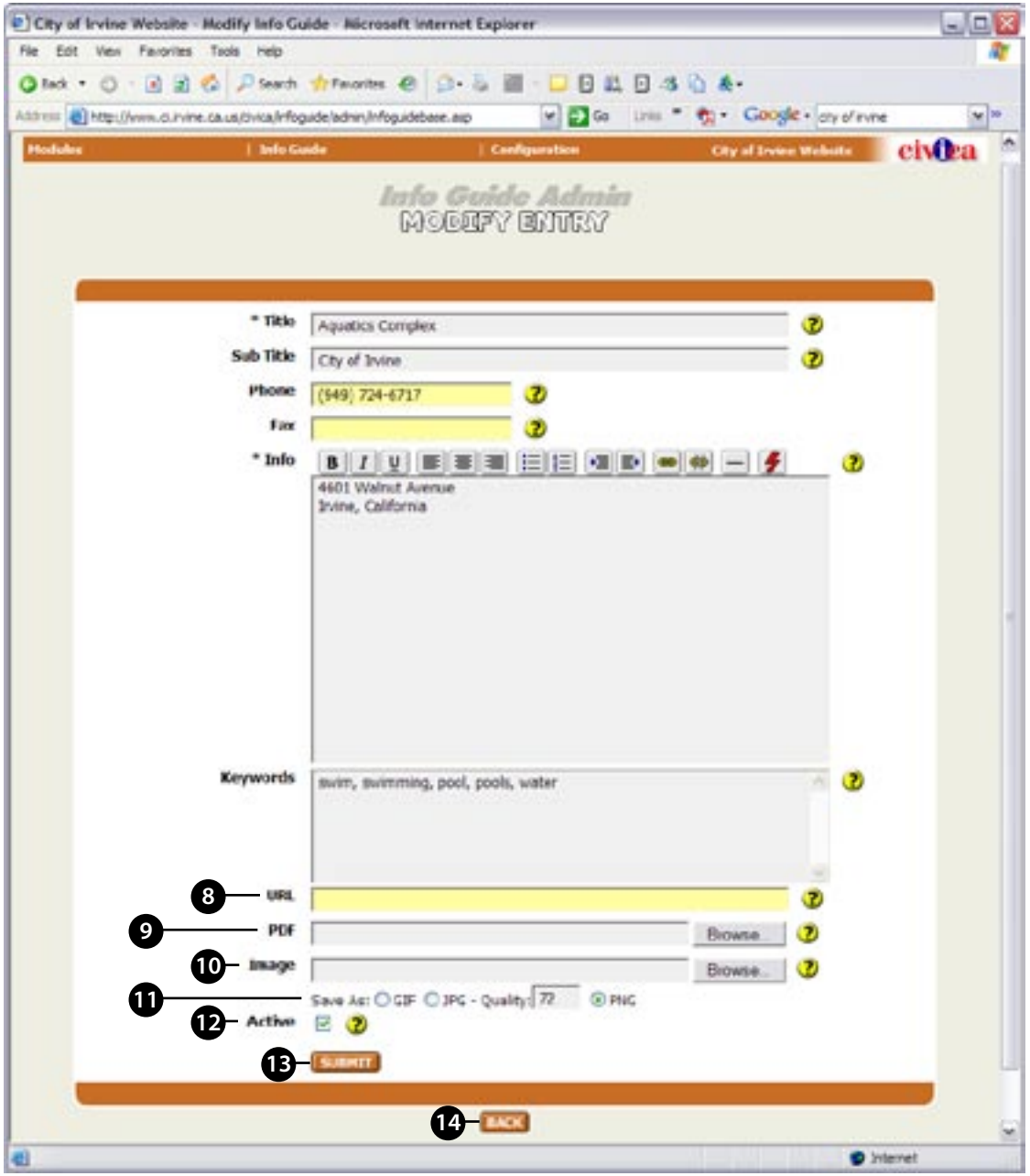
10 **Image**: If an image can be used, such as a logo etc, add it here from your network or local drive. Note: The image will be automatically resized.

11 **Save As:** The image will be saved as a PNG unless othewise selected.

12 **Active**: Check this box to activate this entry and make it available online. If you wanted to create an entry and keep it on file, but not activate it, leave the box unchecked.

13 **Submit:** Click this button to submit the Info Guide to the database. It will open up a dialog box asking for final approval prior to submitting the information to ensure that it was your intent to add the entry.

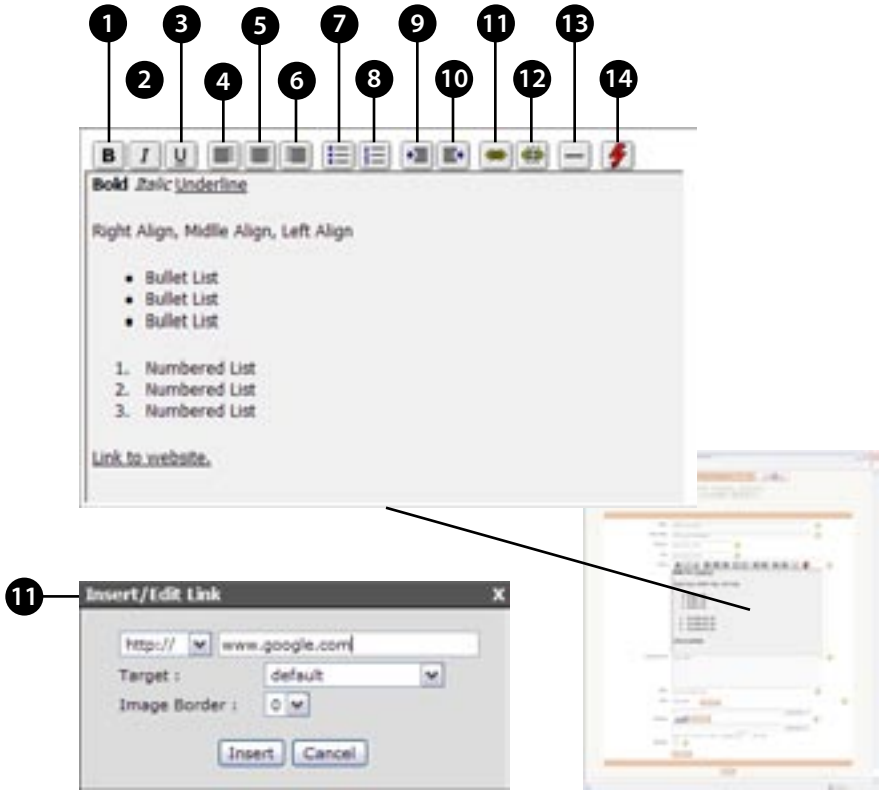
14 **Back:** Click this button to go back to the previous page without saving the Info Guide.



INFO GUIDE

TEXT EDITOR

1. **Bold**: This will make selected type bold.
2. **Italic**: This will make selected type italic.
3. **Underline**: This will make selected type underlined.
4. **Left Aligned**: This will make selected type left aligned.
5. **Center Aligned**: This will make selected type center aligned.
6. **Right Aligned**: This will make selected type right aligned.
7. **Bullet List**: This will make selected type into a bullet list.
8. **Number List**: This will make selected type into a number list.
9. **Increase Indent**: This will increase the indent on selected type .
10. **Decrease Indent**: This will decrease the indent on selected type.
11. **Insert/Edit Link**: This is where you can create a link in the type.
    1. Enter the header of the link.
    2. Then type in the link.
    3. Select the target.
    4. Then click Insert.
12. **Remove Link**: To remove a link, select the type, and click the button.
13. **Horizontal Bar**: This will create a horizontal bar across the text to break up type.
14. **Type Zapper**: This will remove all formatting in the editor.



CIVICASOFT

Jobs Module Instructions

The Jobs module allows the Human Resource staff to post job annoucements to the public and internal candidates. The following instructions are designed to outline this modules capability and to offer instructions on how to build and control job postings entered into the module.

JOB TABLE OF CONTENTS

Manage Jobs 3
Jobs Dropdown Menu
Add New Entry
Date
Title
Department
Active
Modify
Preview
Delete

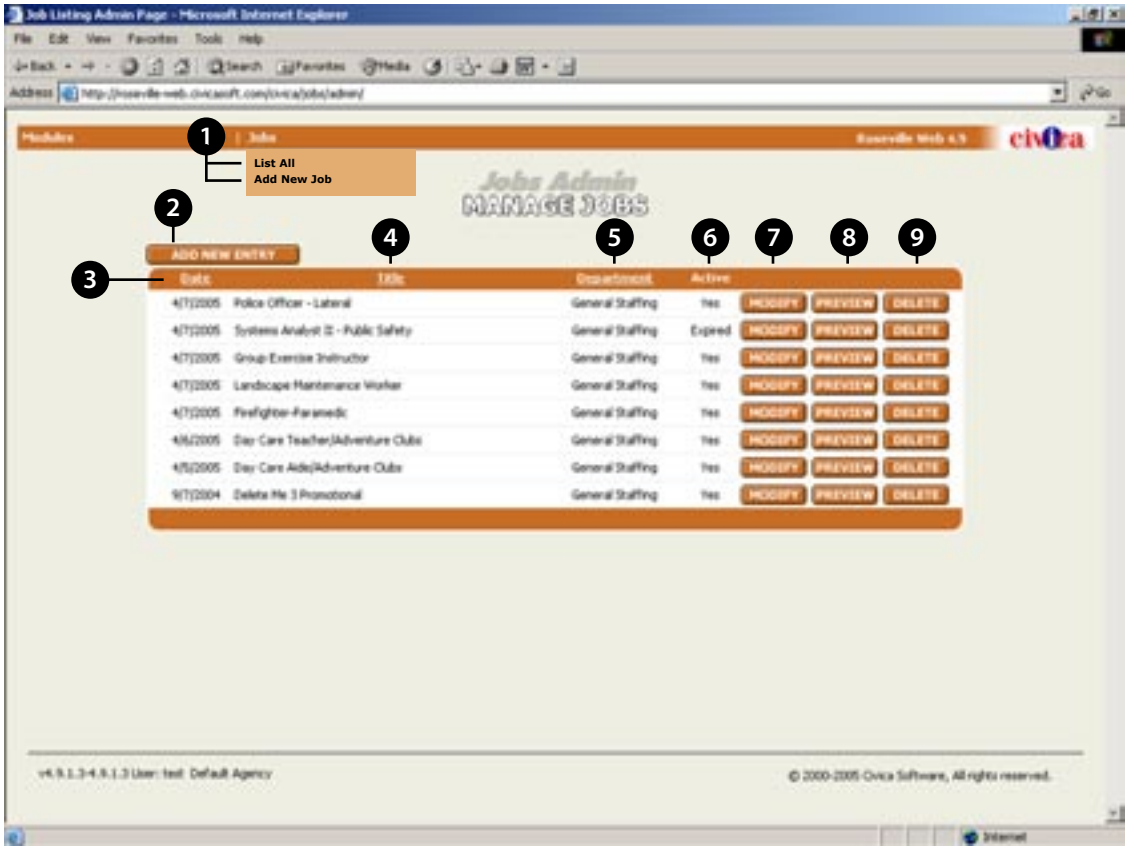
New / Modify Job 4
Title
Position
Position Code
Reference Number
Division
Display Style
Date Job Goes Live
Time On
Post Position Through
Time Off
Program
Location
Contact Name

New / Modify Job ... continued 5
Contact E-Mail Address
Contact Phone
Contact Fax
Job Type
Pay Type
PDF
External URL
External URL Text
External URL Description
Job Pre-Requisite

New / Modify Job ... continued 6
Job Description
Compensation
Is Job Listing Active?
Submit
Reset
Cancel

JOBS

MANAGE JOBS



1. **Jobs Dropdown Menu:** Underneath the Jobs dropdown menu you will find two options.
   List All: This will show you the complete list of all Jobs posted, active and expired.
   Add New Job: This will take you to the New Job page where you can create a new Job.

2. **Add New Entry:** You can easily create a new Job entry by clicking this button.

3. **Date:** Click Date to sort the list by most recent job at the top.

4. **Title:** Click Title to view the list by titles in alphabetical order.

5. **Department:** Click Department to view by City departments in alphabetical order.

6. **Active:** This column will let you know if the job is active, or if it has been expired.

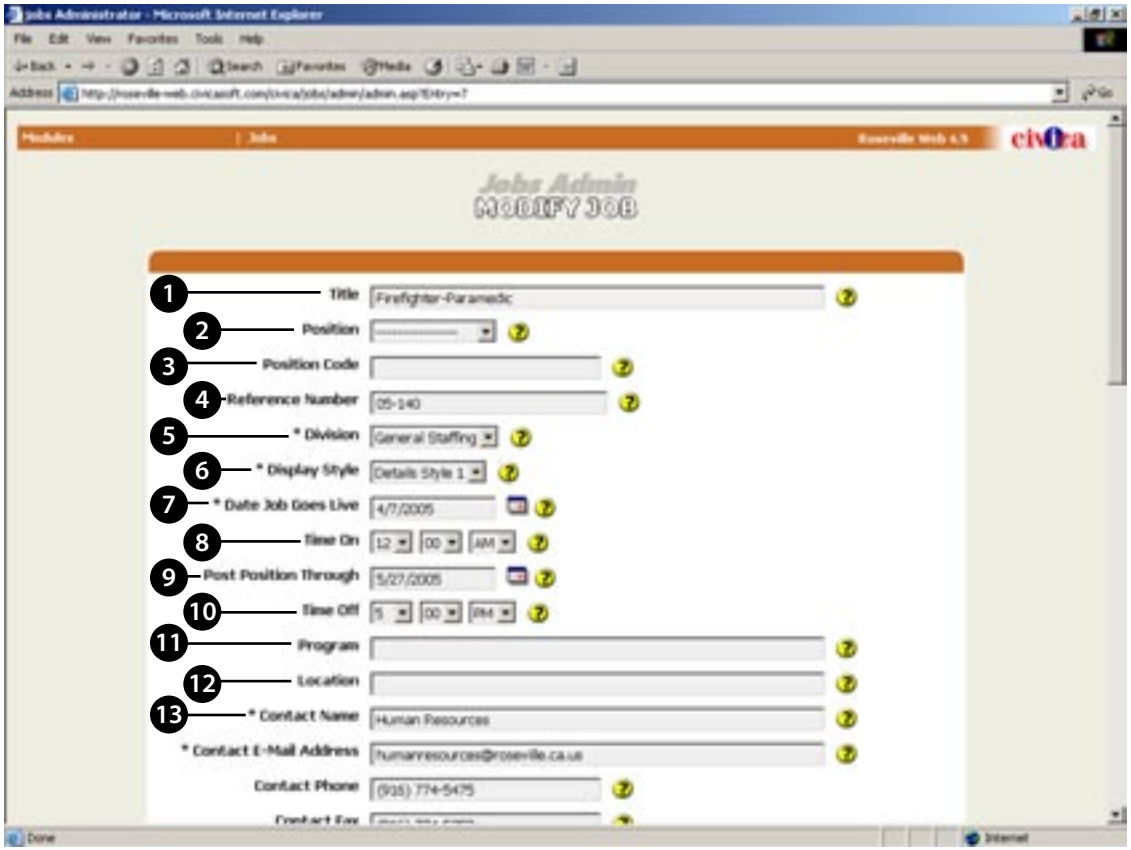
7. **Modify:** Modify an existing job.

8. **Preview:** See what the job will look like.

9. **Delete:** Delete the job permanently.

JOBS

MODIFY JOB



1. **Title:** Enter the title of the position being offered.

2. **Position:** Select the job position from the drop down list.

3. **Position Code:** This is a reference number or a code you may have for job listings in your company.

4. **Reference Number:** Add the job reference number here.

5. **Division:** Select the division that is offering the postition.

6. **Display Style:** Select one of two ways the job can be displayed to users on the website.

7. **Date Job Goes Live:** The date the system will begin to display this job listing.

8. **Time On:** The time the system will begin to display this job listing.

9. **Post Position Through:** The last day the system will display this job. If no date is specified the listing will continue to display until removed, if date is set to 9/99/9999 the listing will display as continuous.

10. **Time Off:** The time that the system will stop displaying this job listing.

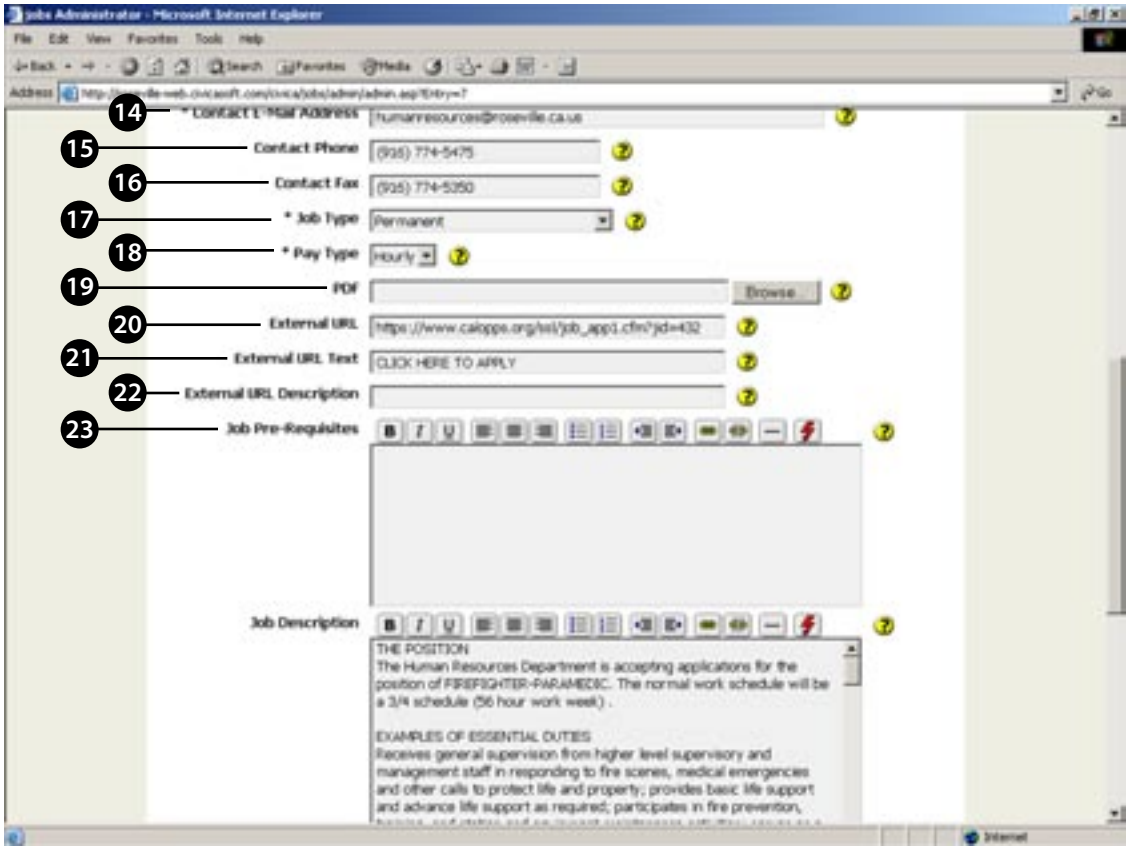
11. **Program:** The name of the program this position is associated with.

12. **Location:** The place where the applicant would be working if they are hired to this position.

13. **Contact Name:** The name of the person the applicant should contact if they want to apply for this position.

JOBS

MODIFY JOB... CONTINUED



14 **Contact E-Mail Address:** The e-mail address of the contact person.

15 **Contact Phone:** The phone number of the contact person.

16 **Contact Fax:** The fax number of the contact person.

17 **Job Type:** Select a type for this job.

18 **Pay Type:** Select a payment style.

19 **PDF:** Choose a PDF job description to upload.

20 **External URL:** Enter the URL of an external link you want to display in the job description.

21 **External URL Text:** Enter the text to display for the link

22 **External URL Description:** Enter a brief description for the external Link.

23 **Job Pre-Requisites:** A detailed list of pre-requisites and qualifications necessary to be considered for this position.

JOBS

MODIFY JOB... CONTINUED

24 **Job Description:** The detailed description of the position being offered.

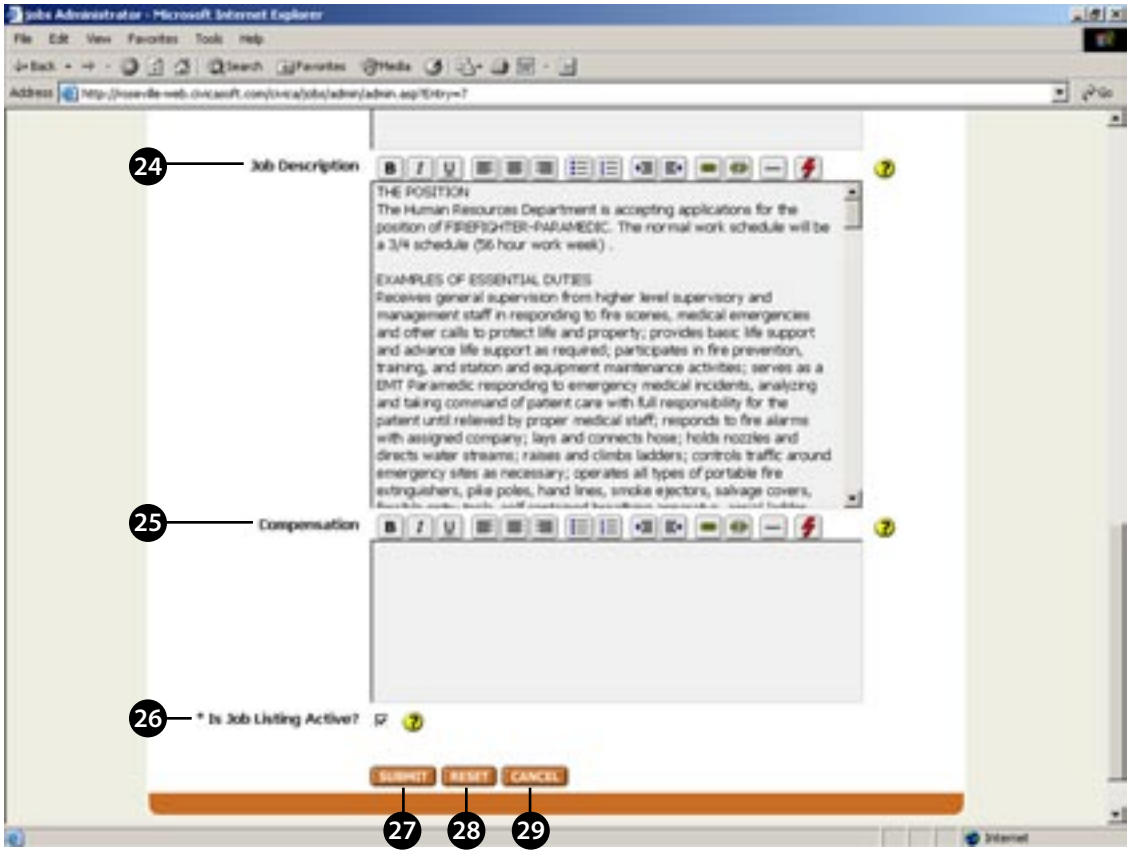
25 **Compensation:** Describe the compensation package here.

26 **Is Job Listing Active?:** Checking this will make this job listing active in the system. If today is between a valid date for displaying the job listing it will be active immediately.

27 **Submit:** Submit the new job listing.

28 **Reset:** Reset the job form.

29 **Cancel:** Cancel the new job listing without saving.



CIVICASOFT

News Module Instructions

The News and Announcement Module allows the user to post news and announcements on their organization's web-site for the general public to access. The user will be able to control the duration that the article is visible, how it is displayed and which section of the web page the article will be placed on the web-site. To add an article to your web-site follow the steps listed below; each section will guide you through the process.

NEWS TABLE OF CONTENTS

Manage Articles 3
Articles Dropdown Menu
Add New Entry
Filter By Target
Search
Modify
Preview
Delete

New Article 4
Article Type
Language
Date News Goes Live
Date News Dies
Time News Dies
Title
Sub-Title
Alternate Link
Front Page Summary
Body

New Article ... continued 5
Search Keywords
Image
Image Description
PDF Link Text
PDF
PDF Link
Show On
Active
Priority
Submit
Reset
Back

NEWS

MANAGE ARTICLES

1. **Articles Dropdown Menu:** Underneath the Articles drop-down menu you will find two options.
   List All: This will show you the complete list of News items.
   Add New Article: This will take to to the New Entry page where you can create a new entry.

2. **Add New Entry:** You can easily create a new News article by clicking this button.

3. **Filter By Targets:** Choose a specific News article category that you want to view and click Refresh.

4. **Search:** Search for a specific News artcile by keyword and click Search.

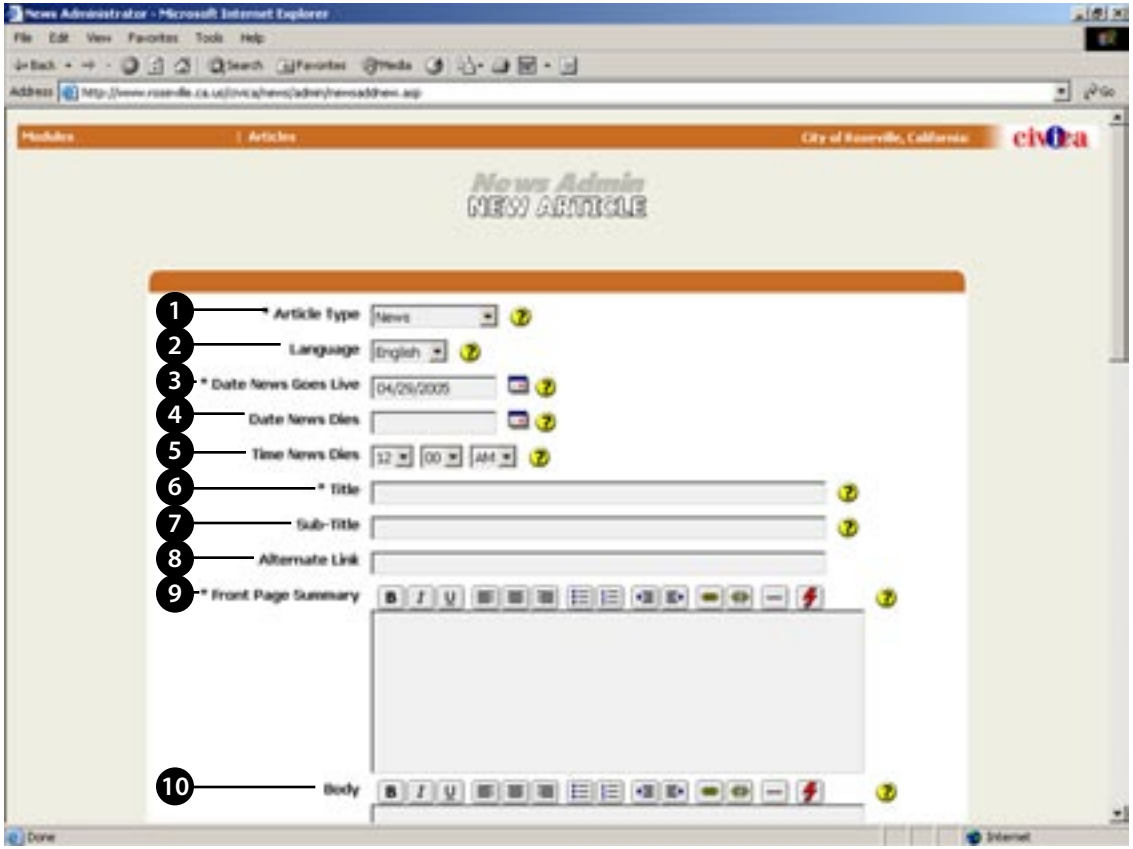
5. **Modify:** Choose this option if you wish to edit an existing News article.

6. **Preview:** Click this button to see a preview of a particular News article.

7. **Delete:** Click this button to delete a specific News article.

NEWS

NEW ARTICLE



1. **Article Type:** Select the desired type of article from the drop-down list.

2. **Language:** Choose which language you want the article in.

3. **Date News Goes Live:** This is the date the News article starts being displayed (it defaults to the creation date). Enter this information in the MM/DD/YYYY format.

4. **Date News Dies:** The first Date that this News article will not be displayed. If no date is supplied the article will always be available.

5. **Time News Dies:** Select the time the article expires.

6. **Title:** Give the News article a title.

7. **Sub-Title:** A Sub-Title is only displayed with the full article, it does not display in the the article summary.

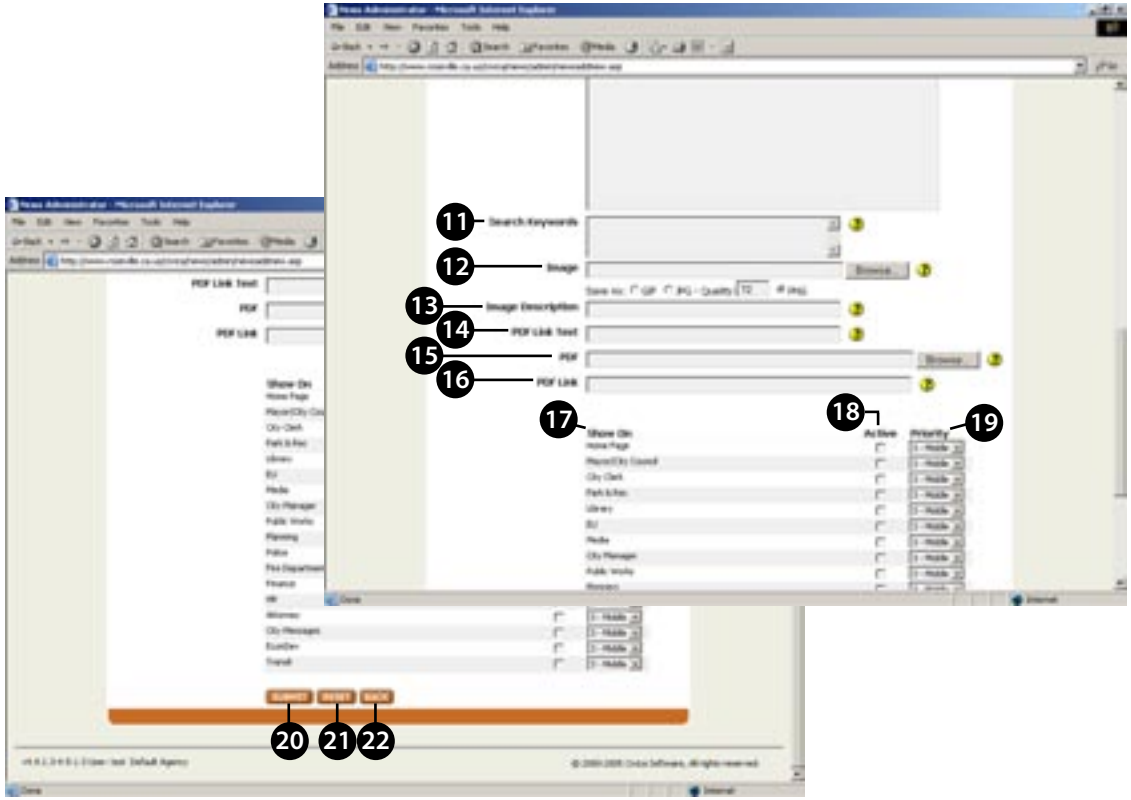
8. **Alternate Link:** Provide a link to a web page that might give more information concerning this News article.

9. **Front Page Summary:** Give a summary of the News article here. This summary will display on the homepage. You may type this information directly, or copy text from another source.

10. **Body:** Place the entire News Article here. This is displayed when the user clicks “more” after the summary.

NEWS

NEW ARTICLE... CONTINUED



11 **Search Keywords:** Enter words that people might use to search for this news story.

12 **Image:** If an image has been uploaded, it will display here. Two buttons allow you to upload an image or delete the existing one. The image types supported are: Most JPEG (.jpg), GIF (.gif), PNG (.png), or Bitmap (.bmp) images unless they are unusually large.

13 **Image Description:** Enter a text description of the image.

14 **PDF Link Text:** Enter the text for the PDF link.

15 **PDF:** Select a pdf file for upload if required.

16 **PDF Link:** Enter the URL of the pdf file you want to link to.

17 **Show On:** Select which pages within the City website that you want this News article to appear on.

18 **Active:** Select the checkbox to activate or deactivate the News article.

19 **Priority:** Select where you want the News article to appear on the web page.

20 **Submit:** Click to submit the News Article to the web site.

21 **Reset:** Click to reset this News article form.

22 **Back:** Click to go back to the previous page without saving.

CIVICASOFT

Press Releases

The Press Release Module allows the user to create and edit Press Releases online. The release can be scheduled in advance by using the calendar function along with ability to assign different headers to each press release. Simple editing tools are included to help with the formatting of a press release. The following instructions are designed to outline this modules capability and to offer instructions on how to generate a press release and post it online.

PRESS RELEASES TABLE OF CONTENTS

Manage Press Releases 3
Releases
Add New Entry
Modify
Preview
Delete

New Press Release 4
PR Number
Display Style
Template
Date
Title
Sub-Title
Main Body

New Press Release ... continued 5
Legal Text
Contact Name
Contact Phone
Contact E-Mail Address
Contact Title
Contact Department
Alternate Contact Name
Alterrnate Contact Phone

New Press Release ... continued 6
Alternate Contact E-Mail Address
Alternative Contact Title
Alternative Contact Department
Is Article Active?
Submit

PRESS RELEASES

MANAGE PRESS RELEASES

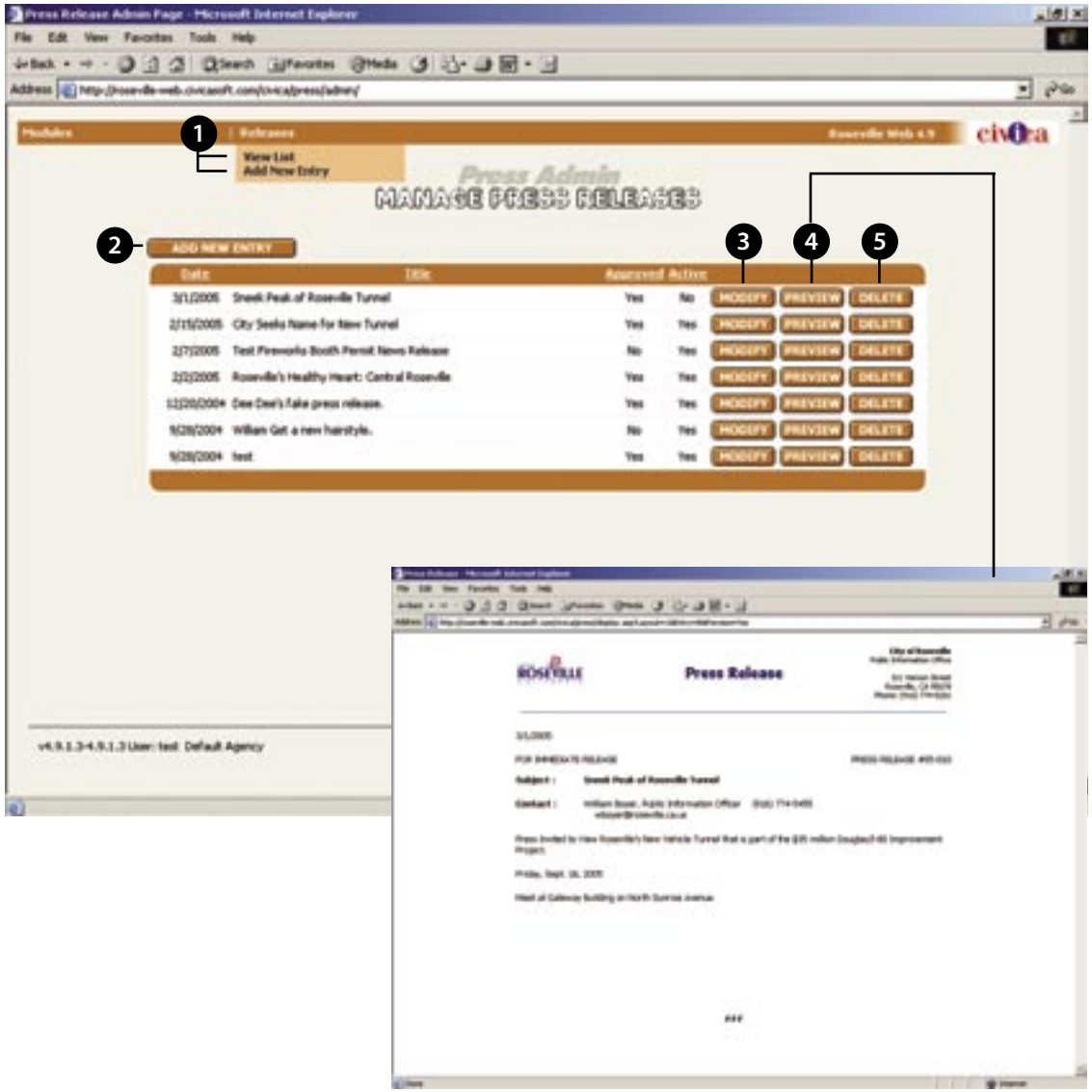
1. **Releases:** Underneath the Releases dropdown menu you will find two options.
   View List: This will show you a list of all Press Releases.
   Add New Entry: This will take to to the New Press Releases page where you can create a new entry.

2. **Add New Entry:** You can easily create a new Press Release article by clicking this button.

3. **Modify:** Choose this option if you wish to edit an existing Press Release.

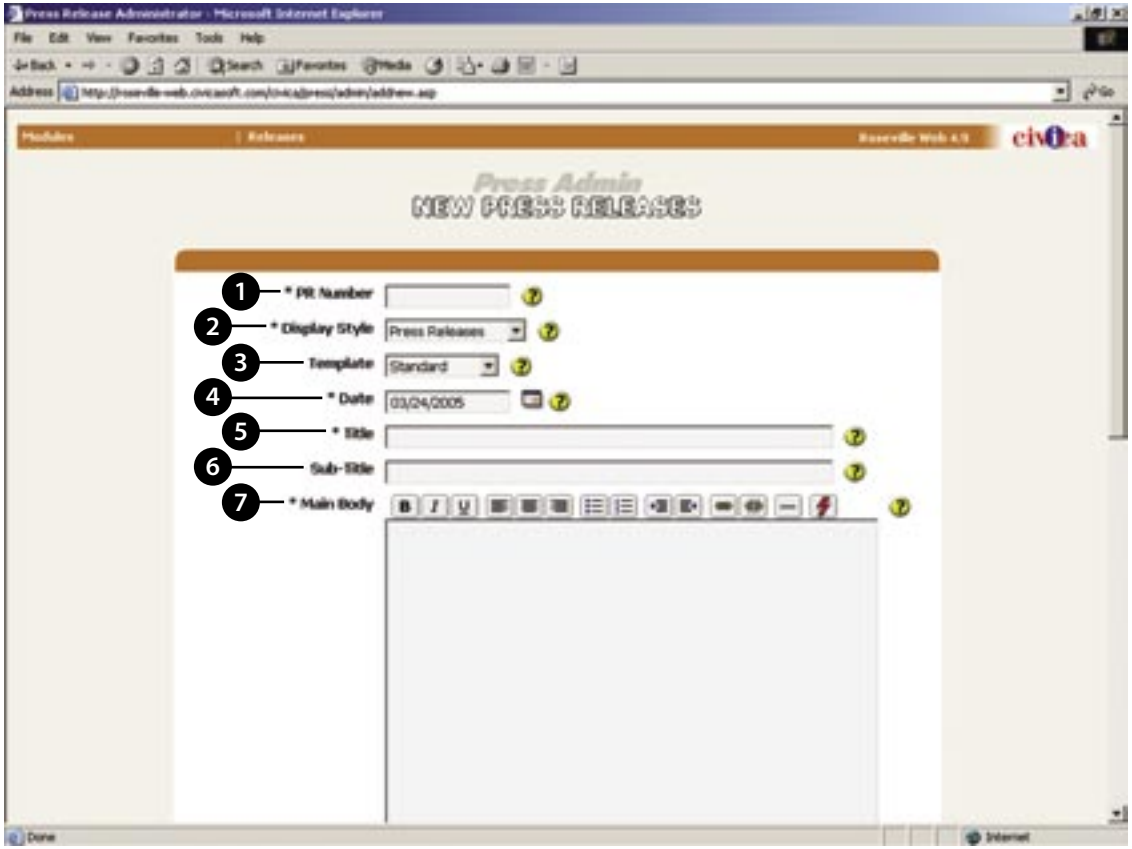
4. **Preview:** Click this button to see a preview of a particular Press Release.

5. **Delete:** Click this button to delete a specific Press Release.



PRESS RELEASES

NEW PRESS RELEASE



1. **PR Number:** A unique ID number used by others to reference this Press Release.

2. **Display Style:** Select a display style to change the display of the Press Release (if this feature is even enabled).

3. **Template:** Pick a Press Release template style for your publication.

4. **Date:** Enter the date for the Press Release.

5. **Title:** Enter a title for the Press Release.

6. **Sub-Title:** The Sub-Title will be shown below the main title of the Press Release.

7. **Main Body:** This is for the actual text information for the Press Release.

PRESS RELEASES

NEW PRESS RELEASE... CONTINUED

8 **Legal Text:** Any associated legal references or statements are entered here.

9 **Contact Name:** Name of the Primary contact for this Press Release.

10 **Contact Phone:** Phone Number of the Primary contact.

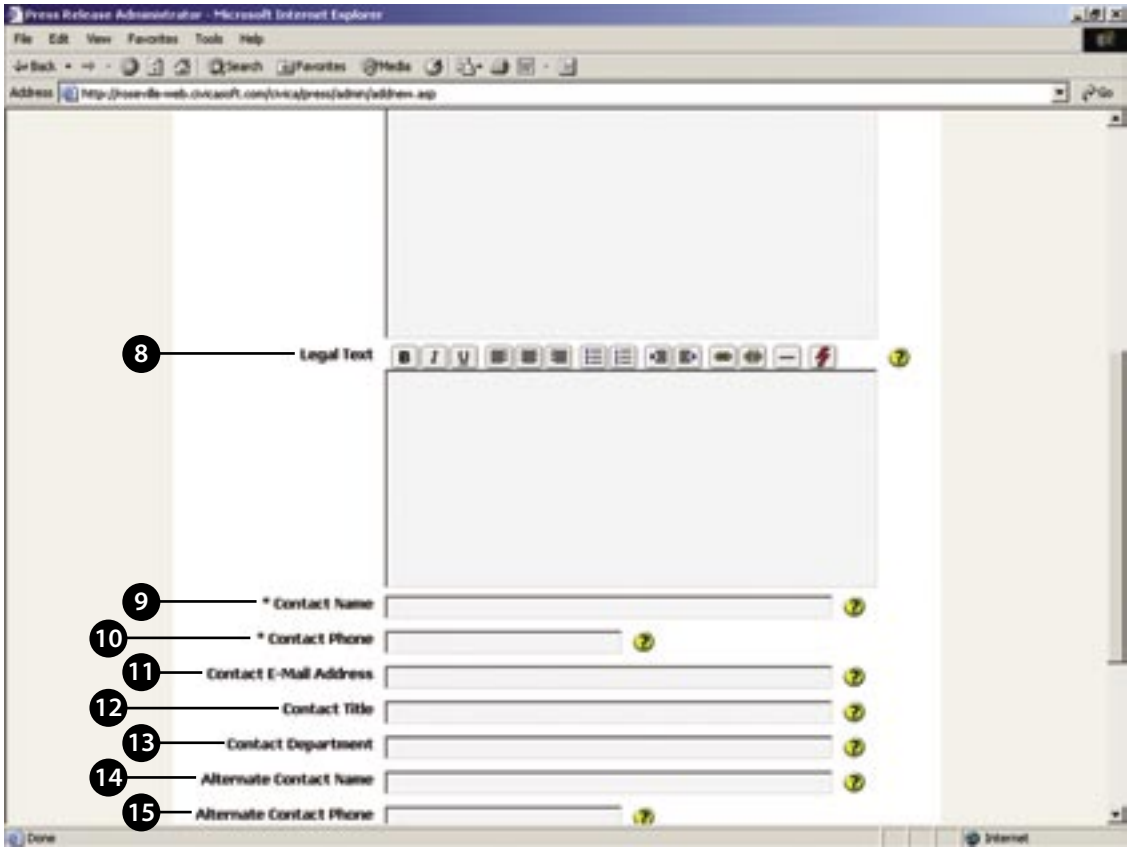
11 **Contact E-Mail Address:** Email address of the Primary contact.

12 **Contact Title:** Title of the Primary contact for the Press Release.

13 **Contact Department:** Enter the Department where the Primary contact works.

14 **Alternate Contact Name:** Name of the person to be listed as the alternative contact for this Press Release.

15 **Alternate Contact Phone:** Phone number for the alternative contact.



PRESS RELEASES

NEW PRESS RELEASE... CONTINUED

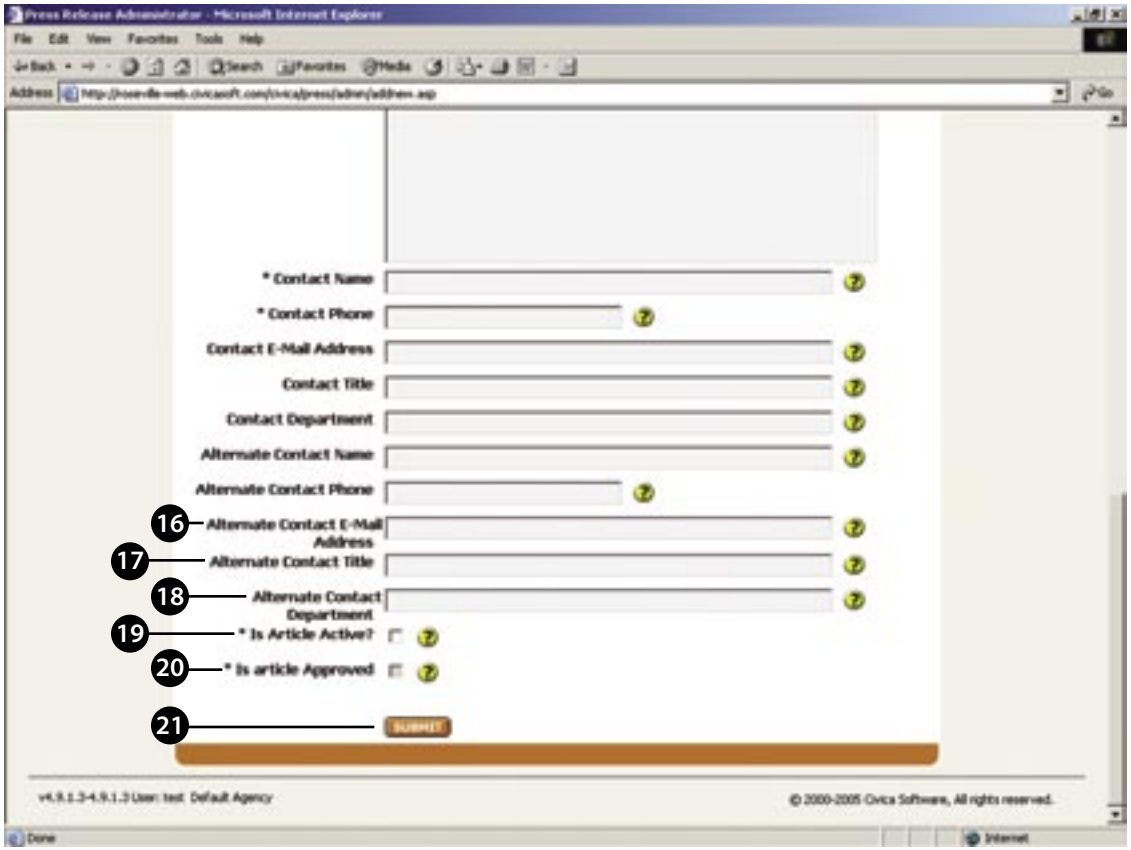
16 **Alternate Contact E-Mail Address:** Email address for the alternative contact.

17 **Alternative Contact Title:** Title of an alternative contact, often a third party or PR agency.

18 **Alternative Contact Department:** Enter the department where the alternative contact works.

19 **Is Article Active?:** If checked, the Press Release will be displayed on the site.

20 **Submit:** Click to Submit the Press Release to the web site.



CIVICASOFT

RFP & Bids Instructions

The RFP / Bids module allows the user to post work for contractors to apply and bid on. The module enables the user to set start and end dates and times and attach supporting documentation to describe the type of work needed to be filled. It also features an award system to notify the winning bidder and those that were not chosen for the work. The following instructions are designed to outline this modules capability and to offer instructions on how to set-up and manage an RFP / Bid.

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Creating or Modifying an Entry 4
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Support Doc 1 Link Text
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RFP & BIDS

RFPS & BIDS:

1. **RFP & Bids Dropdown Menu:** Underneath the RFP & Bids dropdown menu you will find two options.
List All: This will show you the complete list of RFP & Bids.
Add New RFP/Bid: This will take to to the RFP & Bids Admin New Entry page where you can create a new entry.

2. **Add New Entry :** This will take to to the RFP & Bids Admin New Entry page where you can create a new entry.

3. **Category:** This is what Category that the entry has been assigned to. For additional categories contact your site administrator.

4. **Title:** This is the name of the title of the entry.

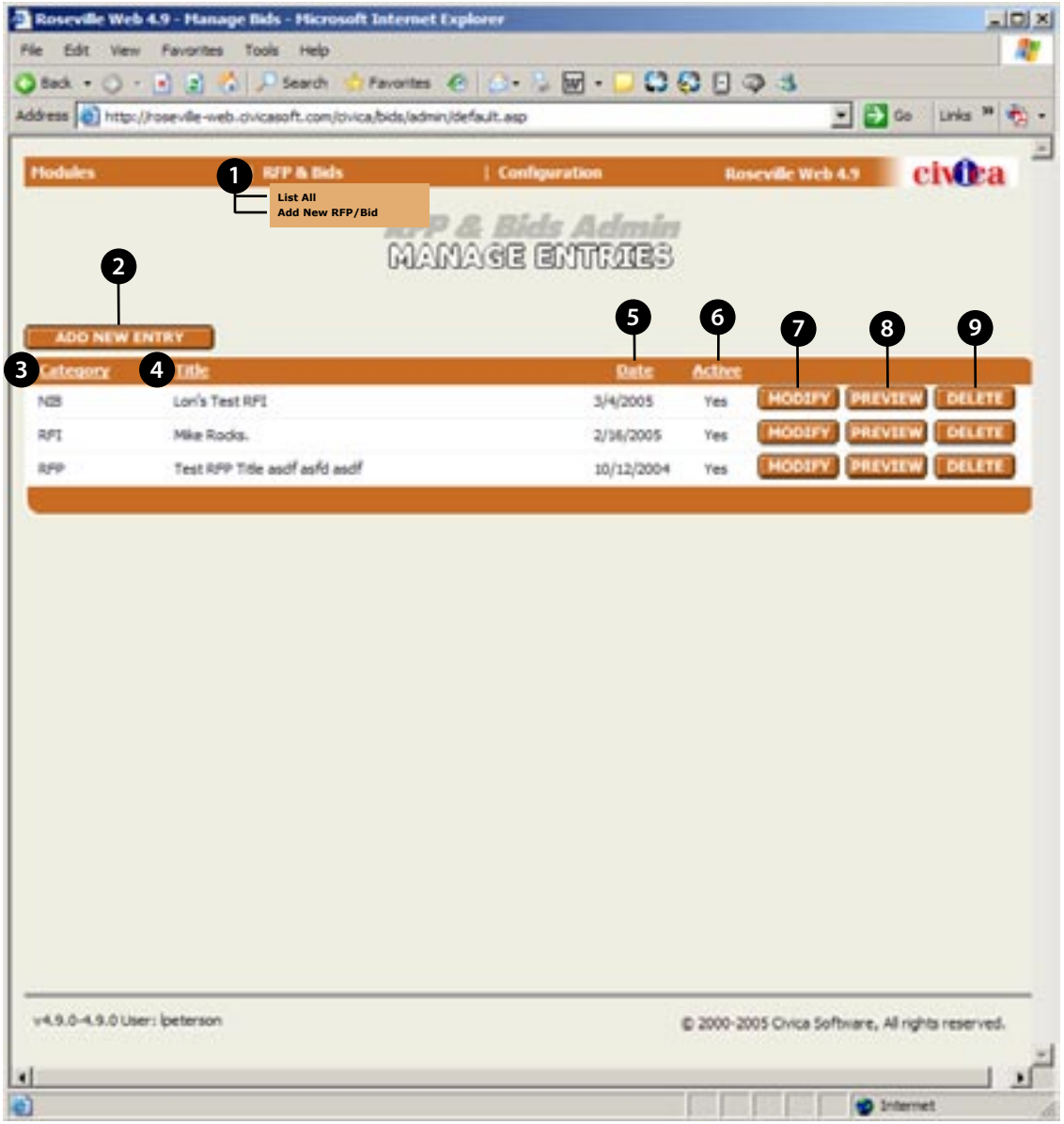
5. **Date:** The date is generated from the publication date of the entry; however, it can be modified accordingly.

6. **Active:**
Yes = will display of the entry to the public.
No = will not display the entry to the public.

7. **Modify:** Click this button to modify an entry that has already been created.

8. **Preview:** Click this button to preview an active or non-active entry.

9. **Delete:** Click this button to permentaly delete an entry. It will bring up a pop-up window verifing permission to permanentaly remove the entry.

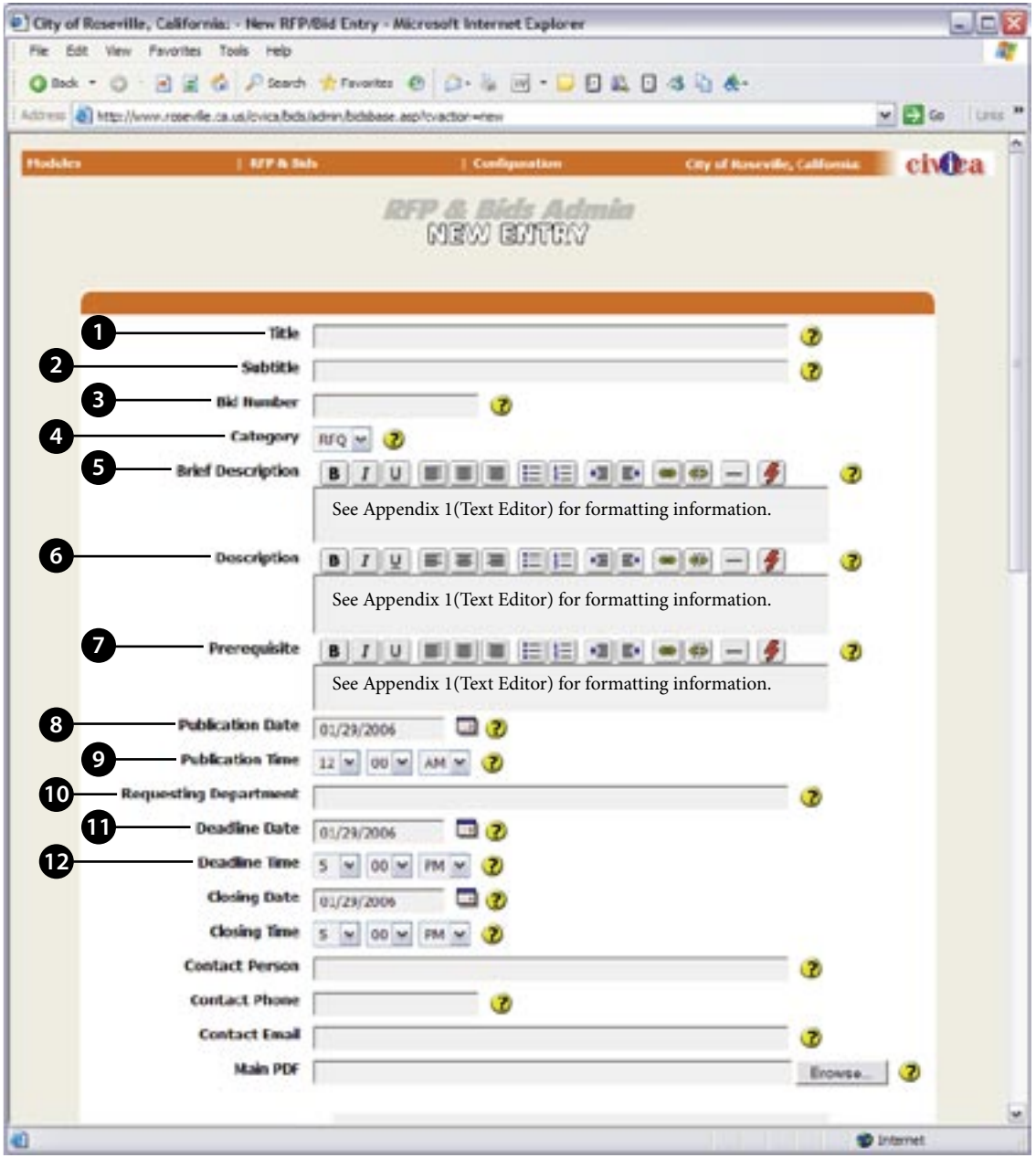


RFP & BIDS

CREATING OR MODIFYING AN ENTRY

1. **Title:** Enter the title of the RFP/Bid.
2. **Sub Title:** Enter subtitle of the RFP/Bid, if required.
3. **Bid Number:** Enter the bid number.
4. **Category:** From the drop down menu, select the category of the bid.
5. **Brief Description:** Enter the summary of the RFP/Bid into the Brief Description Window or drag into the window a document from another source.

   See Appendix 1(Text Editor) for formatting information.
6. **Description Window:** Enter the full text of the RFP/Bid into the Description Window or drag into the window a document from another source.
7. **Prerequisites Window:** Enter the prerequisites to the RFP/Bid into the Prerequisites Window or drag into the window a document from another source.
8. **Publication Date:** Enter the Publication Date or select the date by clicking on the calendar icon.
9. **Publication Time:** Using the drop down menus, select the Publication Time of the RFP/Bid.
10. **Requesting Department:** Enter the Requesting Department into the next window.
11. **Deadline Date:** Enter the Deadline Date or select the date by clicking on the calendar icon.
12. **Deadline Time:** Using the drop down menus, select the Deadline Time of the RFP/Bid.



RFP & BIDS

CONTINUED CREATING OR MODIFYING AN ENTRY

13 **Closing Date:** Enter the Closing Date or select the date by clicking on the calendar icon.

14 **Closing Time:** Using the drop down menus, select the Closing Time of the RFP/Bid.

15 **Primary Contact:** Enter the Primary Contact with Name, Telephone# and Email Address into the next three fields.

16 **Main PDF:** If you wish to attach a PDF File to the entry, click on the Browse button and drag the file from its folder into the box.

17 **Main Doc Link Text:** This will allow you to name the Main Supporting Doc URL name.

18 **Support Doc 1:** If you wish to attach Support Documents to the entry, click on the Browse button and select a file.

19 **Support Doc 1 Link Text:** This will allow you to name the Supporting Doc 1 URL name.

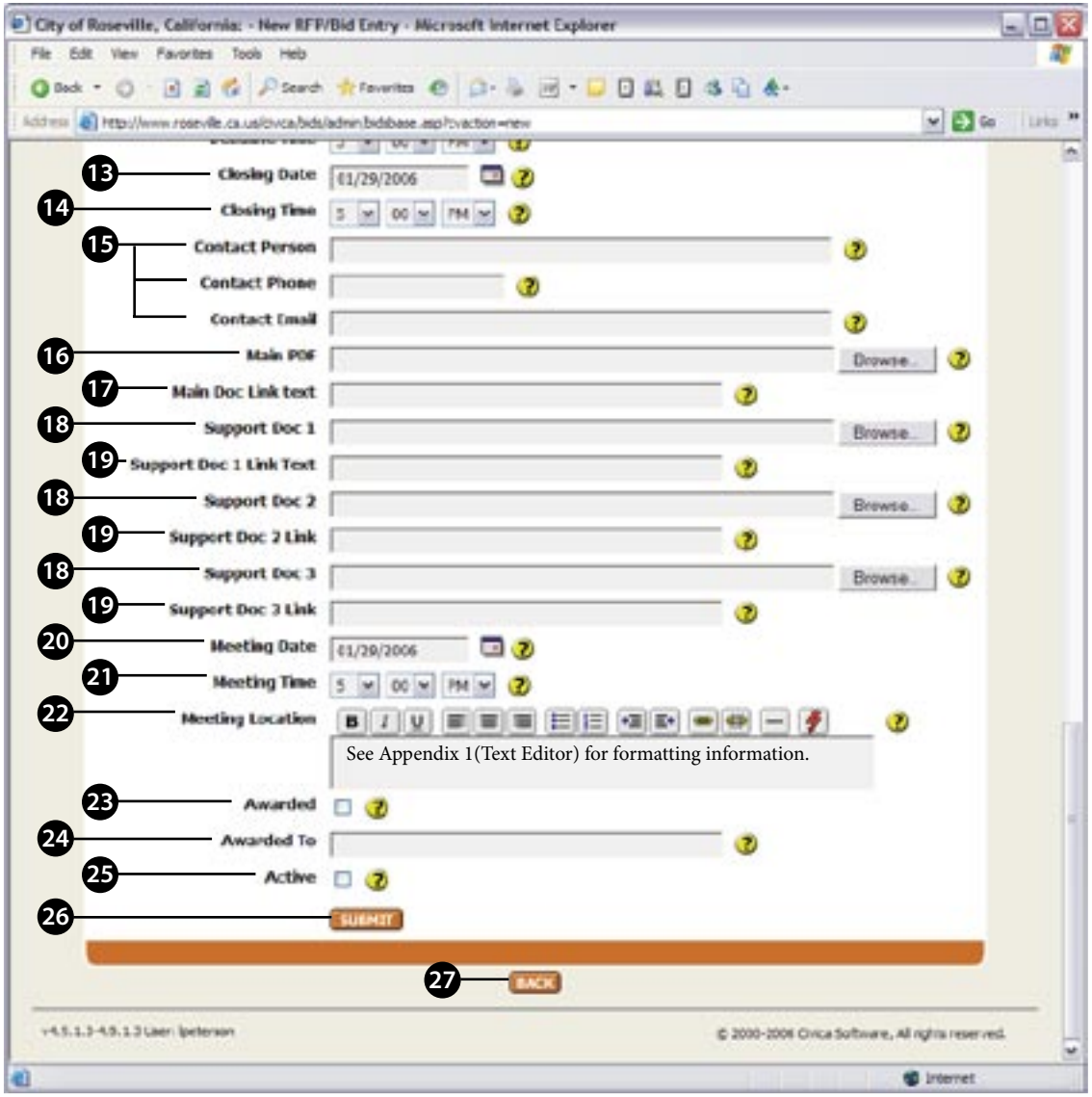
20 **Meeting Date:** Enter the Meeting Date or select the date by clicking on the calendar icon.

21 **Meeting Time:** Using the drop down menus, select the Meeting Time of the RFP/Bid.

22 **Meeting Location:** Enter the Meeting Location in the next window, or drag in a document from another source.

23 **Awarded:** Check the Awared check box to display the name entered into the Awarded To text.

24 **Awared To:** Enter the name of the company that was selected.



25 **Active:** Check the box if you want the entry to be active.

26 **Submit Button:** Click the Submit Button to send the RFP/Bid to the system. A pop-up window will ask you if you want to send the entry to the site click "Ok". The new RFP/Bid will be automatically displayed on the site or intranet.

27 **Back:** Click the Back button to go back to the previous page without saving.

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Quick Links Module Instructions

The QuickLinks Module allows site editors to redirect page addresses to other pages, files, news stories, press releases, faqs, info guide, and outside links. To add a QuickLink to your site follow the steps listed below; each section will guide you through the process.

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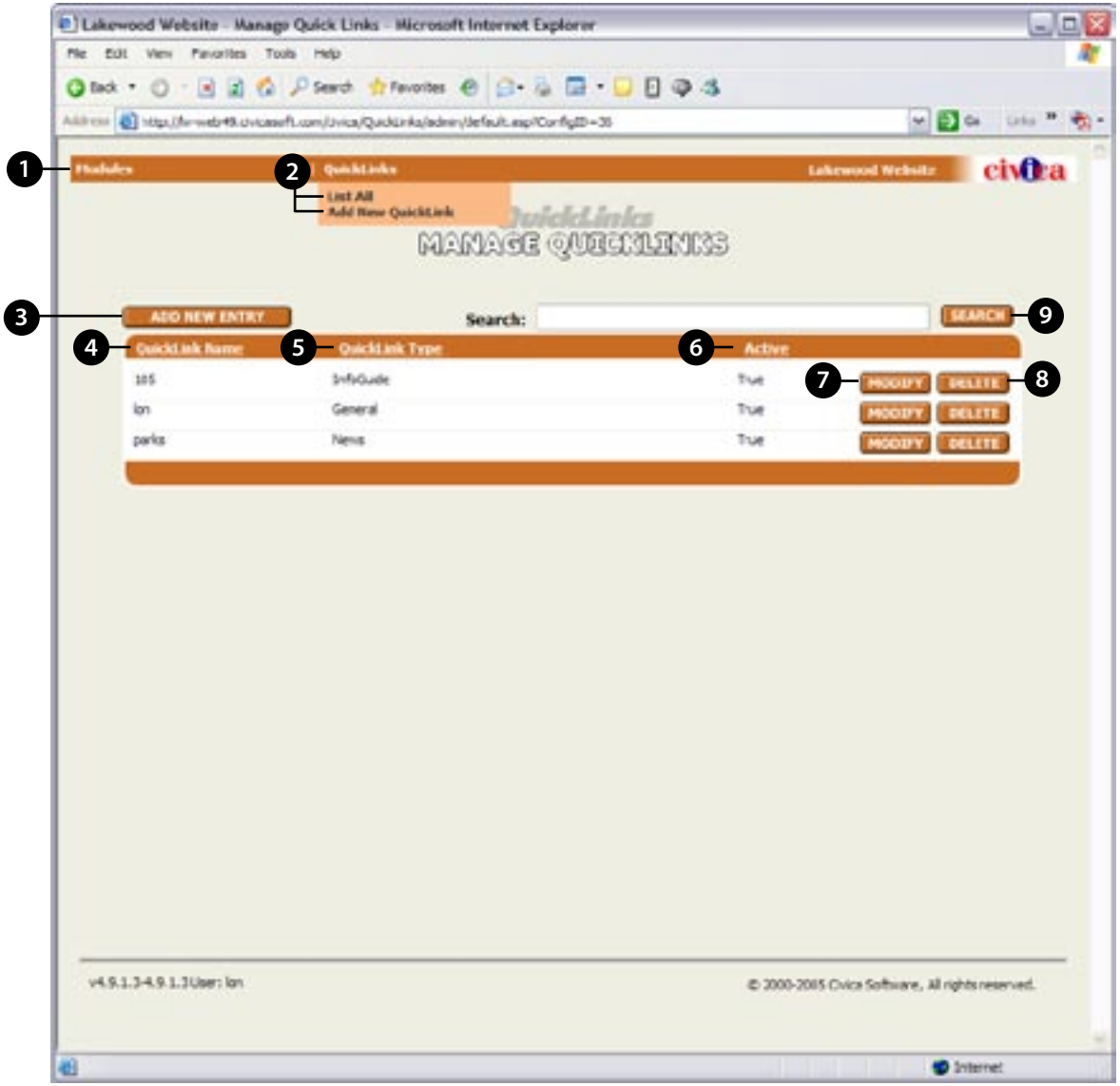
Search QuickLinks 6
QuickLinks Site Search
Site Search Results

QUICKLINKS

MANAGE QUICK LINKS



1. **Getting Started - Modules:** To begin, move your mouse over the Module tab then click "QuickLinks". Once the Quick-Links module is selected, it will bring you to the "Manage QuickLinks" page (see example to right). This is main page that displays all the QuickLinks created.

2. **QuickLinks - Dropdown Menu:** Underneath the Quick-Links dropdown menu you will find two options:
   - **List All** will show you the complete list of the QuickLinks.
   - **Add New QuickLink** will take you to the New QuickLink page where you can create new QuickLink.

3. **Add New QuickLink Entry:** Easily create a new QuickLink article by clicking this button.

4. **QuickLink Name:** This is the name of the QuickLink. This is the name that goes after your domain name.
   For example: www.yourdomianname.com/quicklinkname

5. **QuickLink Type:** This is auto populated when you use the search button (#4). However, you can manually select a type from the drop-down menu.

6. **Active:** If the Quicklink is active it will be "True". Likewise, if it is "False", it is not active.

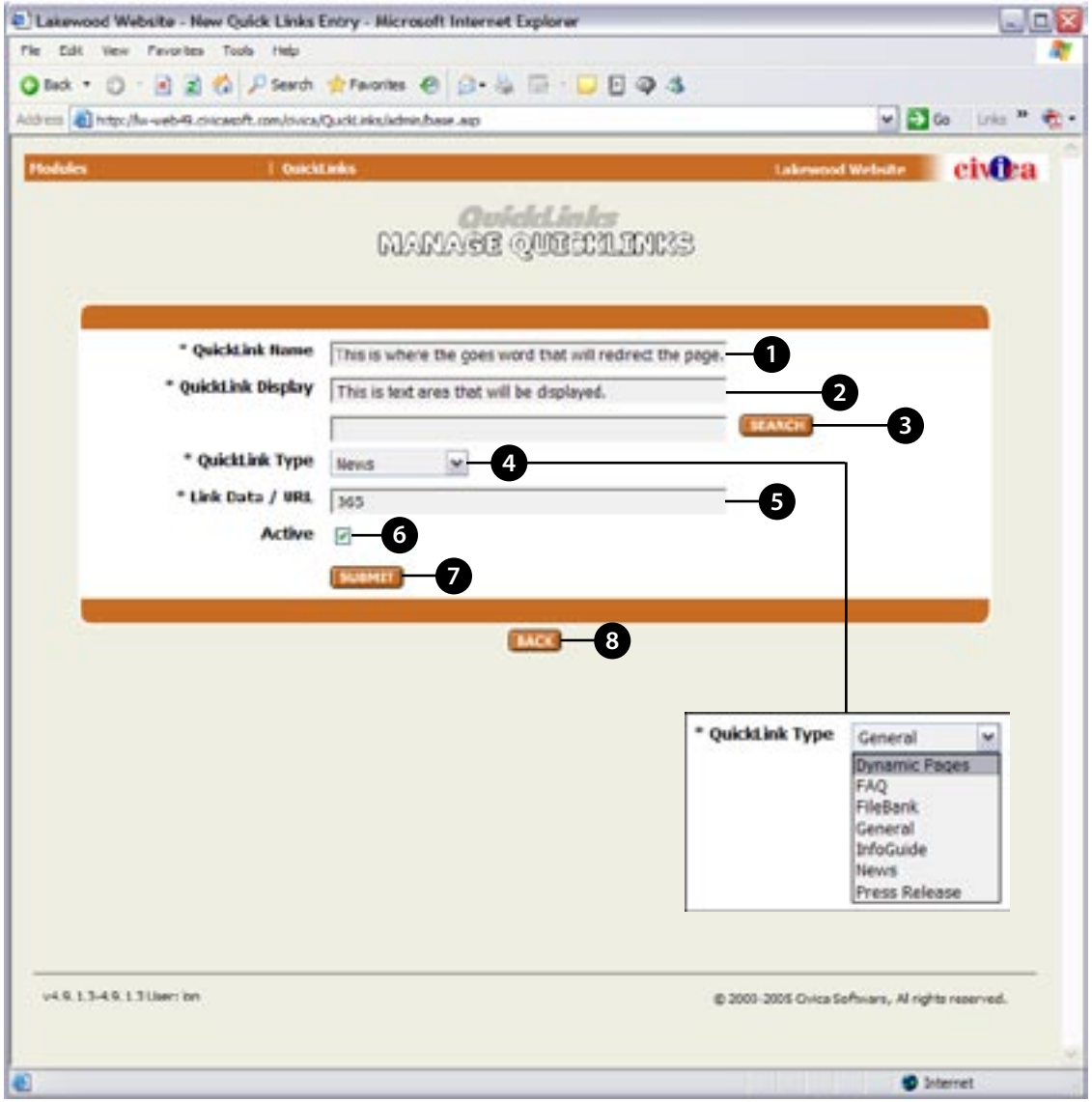
7. **Modify:** To edit an existing QuickLink, click this button.

8. **Delete:** To delete a specific QuickLink, click this button.

9. **Search QuickLink Titles:** Enter in a keyword into this field to search for a Quicklink in the database.

QUICKLINKS

CREATE QUICK LINKS



1. **QuickLink Name:** This is the name of the QuickLink. This is the name that goes after your domain name. For example: www.yourdomianname.com/**quicklinkname**
So a hypathetical link like this www.ci.cityname.ca.us/**recycle** could link to another webpage within the website, an outside webpage, a FAQ, a file in the FileBank, an InfoGuide link, a News item, or a Press Release.

2. **QuickLink Display:** This is the name that will appear when someone searches on the global search.

3. **Search Site Data:** Enter in a keyword or phrase in the search field, then hit the search button. This will search your site and all the modules for relavant data from your keyword.

4. **QuickLink Type:** This is auto populated when you use the search button (#3). However, you can manually select a type from the drop-down menu.
Dynamic Pages: This will link to regular pages within the site.
FAQ: This will link to a specific question in the FAQ database.
FileBank: This will link to a specific file in the FileBank.
General: This will redirect to an external website.
Info Guide: This will link to specific data in the InfoGuide.
News: This will link to a specific News story.
Press Release: This will link to a specific Press Release.

5. **Link Data / URL:** The Link Data / URL is auto populated when you use the search button (#3). However, you can add your own URL into this field. Note: if you do add a custom URL into this field, you must select the "General" tab located in the QuickLink Type above (#4).

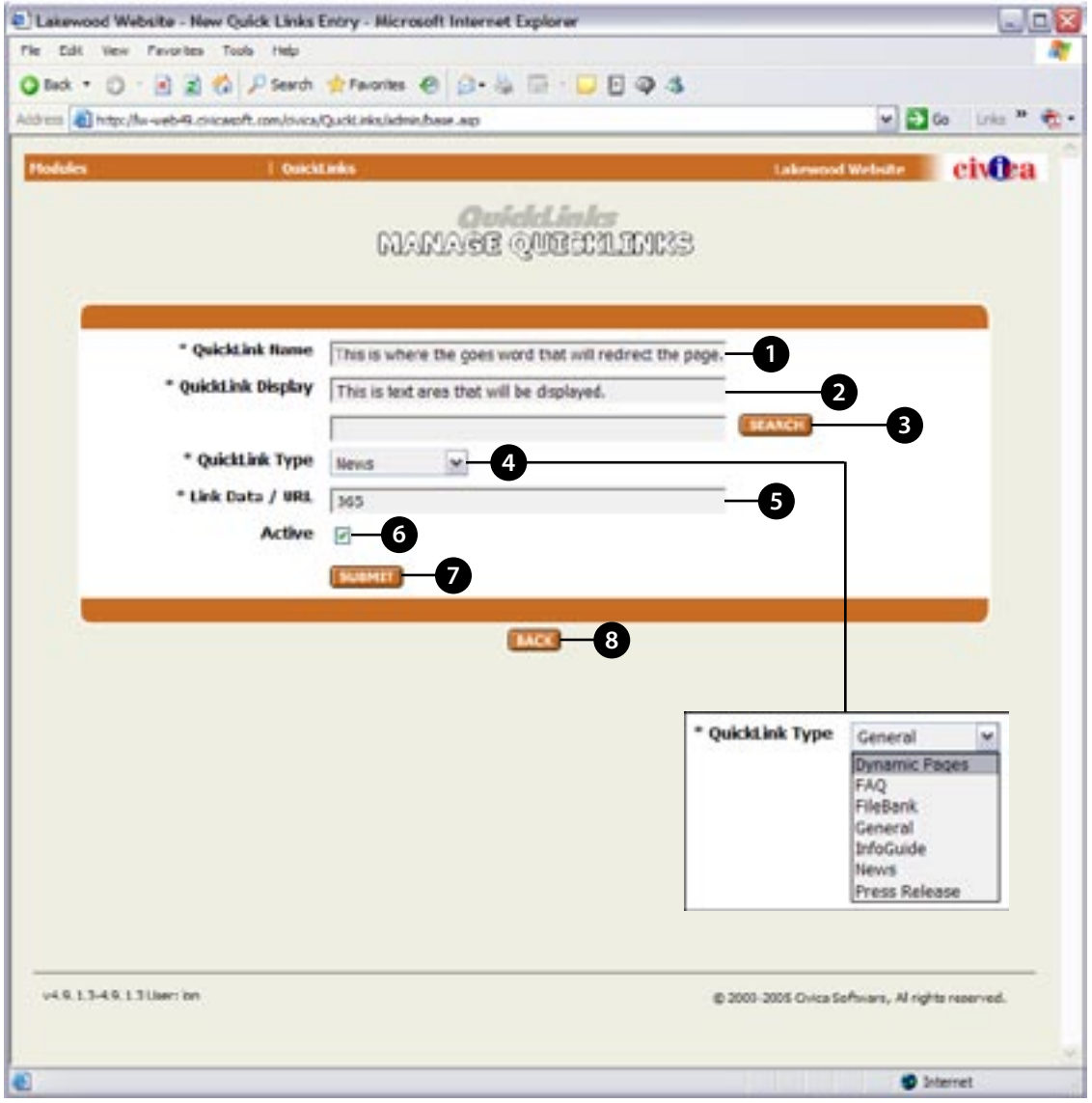
QUICKLINKS

CREATE QUICK LINKS... CONTINUED

6 **Active:** If the box is checked, then the Quicklink is active. Likewise, if it is not checked, then it will not be redirect.

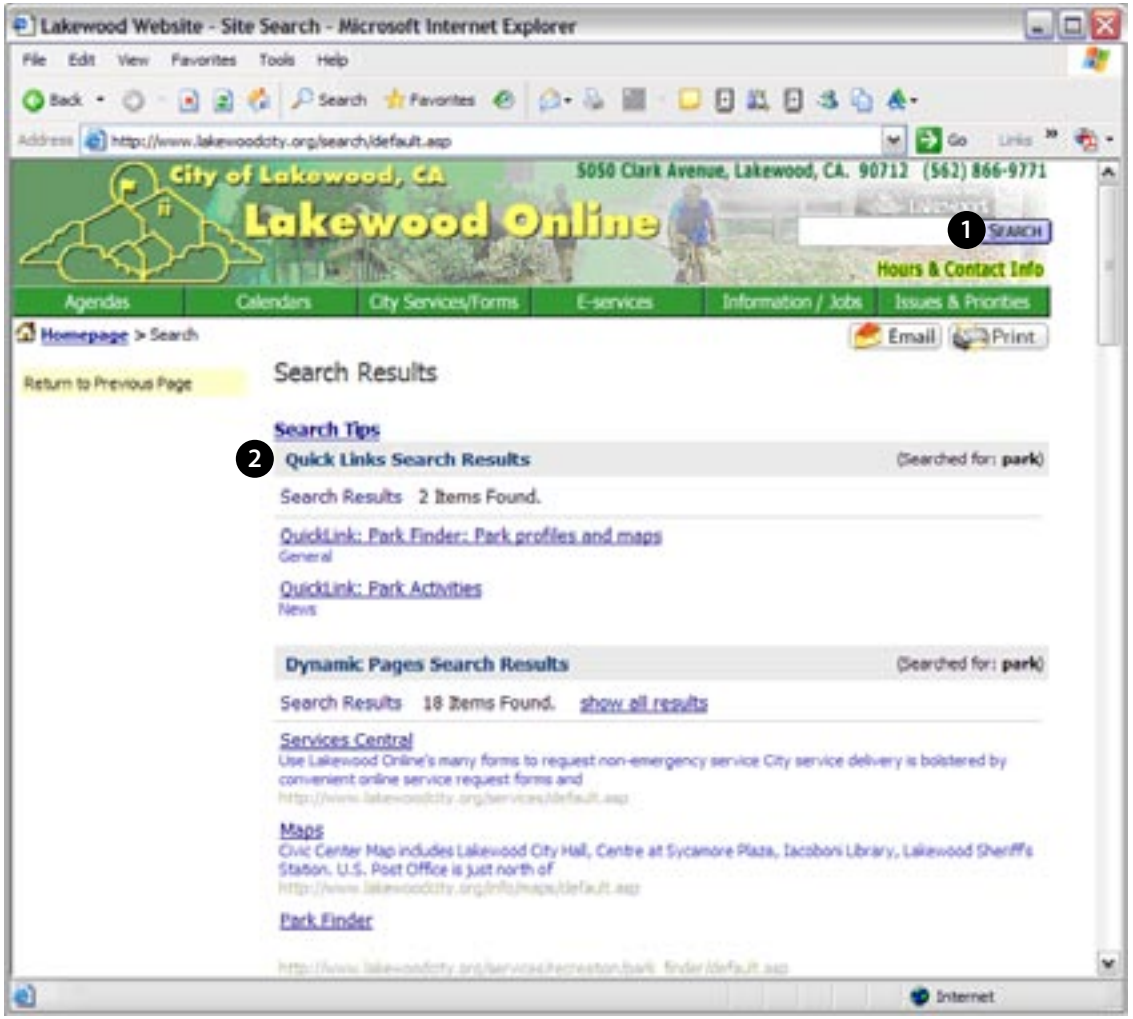
7 **Submit:** This button will submit your QuickLink to the database. Once you click the submit button, a popup window will be displayed prompting you to agree to add it to the database. This is done to ensure entries are ready to be added just in case the submit button was clicked on accident prior to completing the entry.

8 **Back:** This button will take you back to the main Quicklinks application page.



QUICKLINKS

SEARCH QUICK LINKS

1. **Site Search:** Enter in a keyword or phrase in the main search field (the one typically located at the top of every webpage), then hit the search button.

2. **Site Search Results:** Once you have entered a keyword in the search field, this will search your site and all the modules for relevant data from your keyword or phrase. For example, if you search for "Parks" in the main search field, it will display the results (see example to the right) if "Parks" is a QuickLink. If "Parks" is not a QuickLink, then no results will be displayed.