eGov Manager V6

Transition Guide

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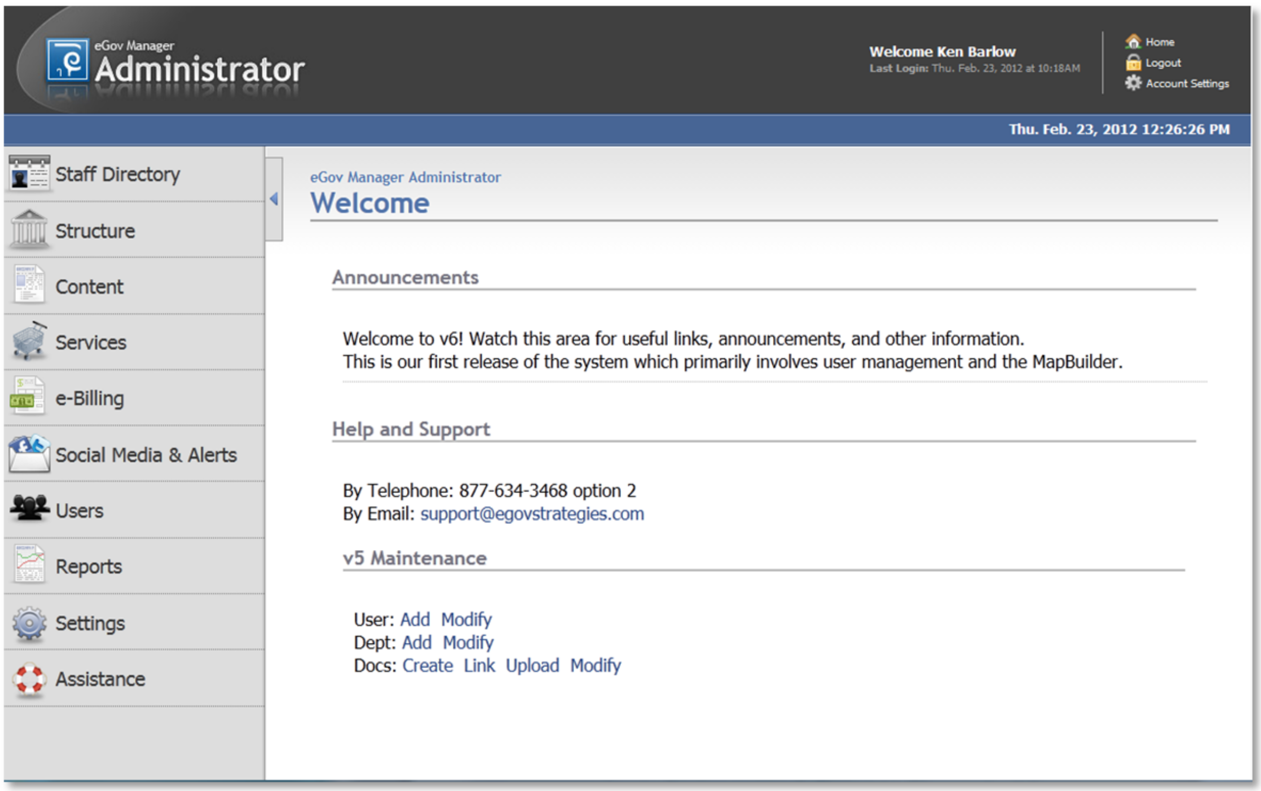
INTRODUCTION TO EGOV MANAGER V6

The eGov Manager is the administrative tool that your organization will use to manage content and interactive services for your website. The latest release of our software (v6) represents a significant advancement over previous versions in terms of site navigation, functionality and expandability.



eGov Manager Functions

Site navigation is now controlled by the left-hand navigation bar. Options will vary based on your specific configuration, but could include the following:

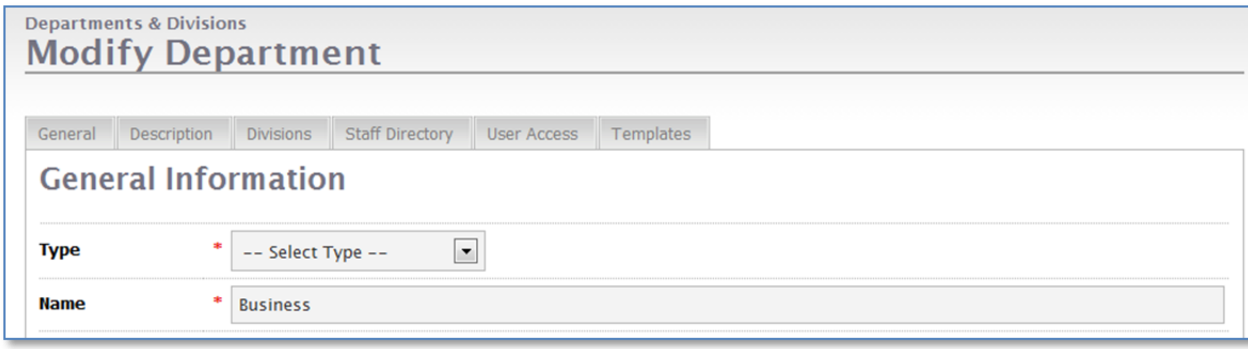
- Staff Directory
- Structure
- Content
- Services
- Social Media & Alerts
- Users
- Reports
- Settings
- Assistance

Note that as you select a function from the left-hand navigation, more options associated with that function will expand below it. As you select functions or the various options under a function, you will notice that you will jump to the page for that specific function but the left-hand navigation will remain where it is.

Application Dashboards

Another major enhancement within the eGov Manager is the use of *application dashboards* within each of the major applications that you may use within the eGov Manager – i.e. when managing departments, documents, events, users, online forms, payment items etc.

You will generally encounter an application dashboard whenever you select a specific content item within an application (e.g. when you select a Department). The application dashboard features tabs that represent different types of content or functions that you can do for that specific content item.

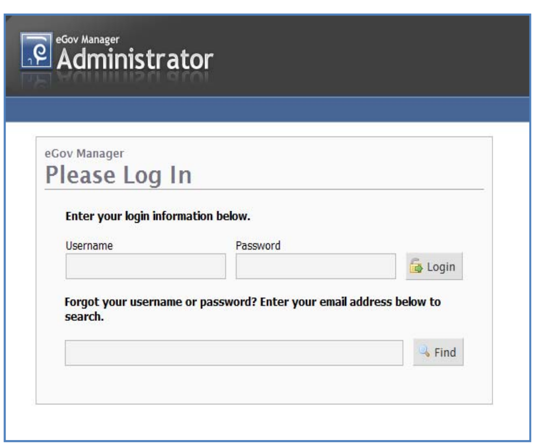


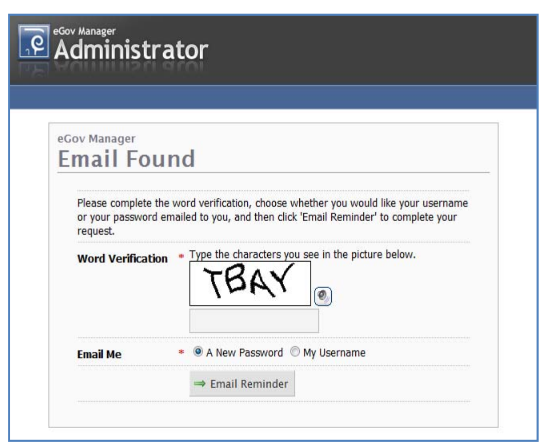
Browser Options

For the best experience in using the eGov Manager, users should opt for more advanced browsers like the latest versions of the Google Chrome and Mozilla Firefox browsers. Internet Explorer (IE) users will be able to complete most functions within the software, but users of these browsers will experience significantly more slowness with IE than with other browsers.

Login, Logout & Password Recovery

The new eGov Manager Administrator look-and-feel is evident from the initial sign-on screen. We have added additional security measures so that Webmasters may configure users to complete CAPTCHA verification in order to request their password or username – based on their email address.



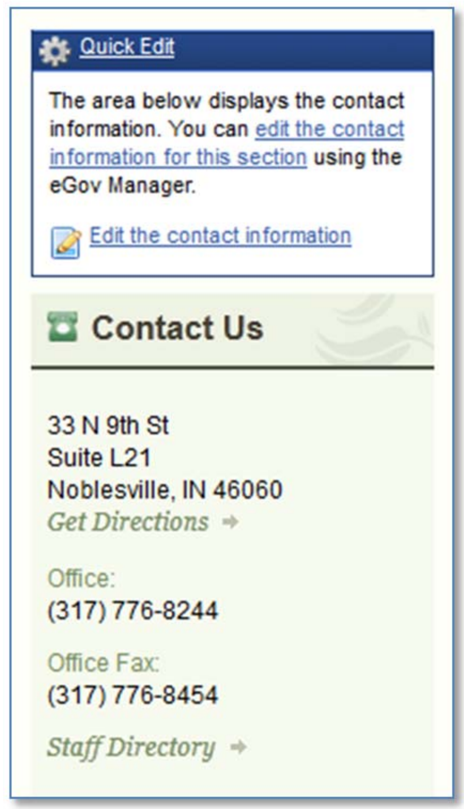


FRONT END EDIT

eGov announces new features that make it easier to edit website content. Our Front End Edit and Quick Edit features provide two strategies for making it easier to make government information available to your constituents.

In order for you to see the Front End Edit and Quick Edit functions, you must first log into the the eGov Manager. If you are logged in and you jump to your website (either in the same browser or using another tab within your browser), you will see this bar at the top of your browser window:

Front End Edit



If you see the blue bar at the top, you will now see ***blue bars*** over various content areas. These blue bars will say "**Quick Edit**".

By clicking on one of the "Quick Edit" features, you will receive a drop-down dialog box that reveals information about the area that you are trying to edit.

By selecting "**Edit …** ", you will be forwarded to the appropriate place within the eGov Manager to edit that specific content. Very likely, this will open up in either a new browser tab or in the browser tab in which you initially opened and logged into the eGov Manager.

Note that if – after making your edits - you want to see what the page looks like without Front End Edit, use the "Hide Front End Edit" link in the Front End Edit bar to toggle Front End Edit on and off.

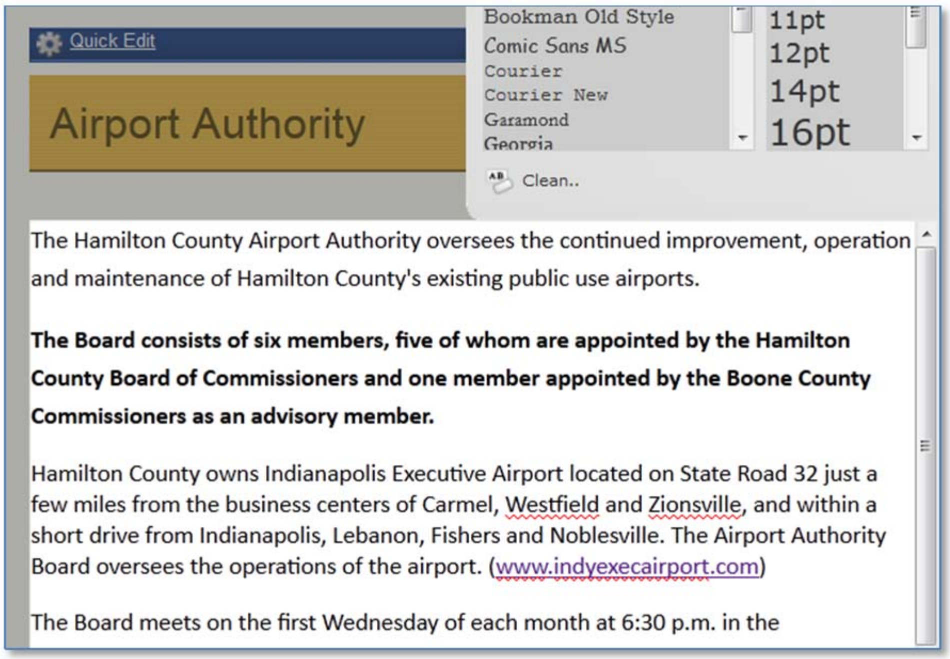
Quick Edit

The Quick Edit feature is an extension of Front End Edit that makes it even easier to make changes to website content.

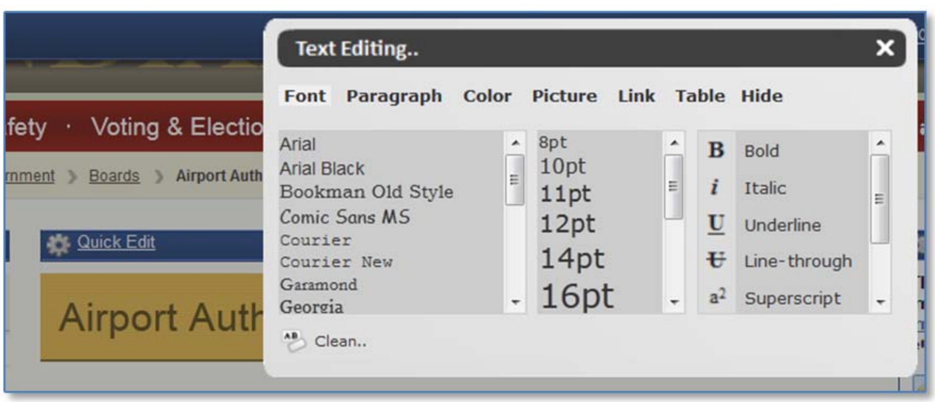
For certain types of content items (e.g. Department descriptions, Division descriptions, Topic descriptions, Subtopic descriptions, etc.), users can make changes without returning to the eGov Manager interface. Follow these three steps once you are logged into the eGov Manager system:

1. **Look for the pencil icon below a Front End Edit bar (circled below) and click on it;**

2. **Click your mouse inside of the white editing box and make your edits;**



3. **In the grey pop-up box, modify font types, colors, add photos and links.**



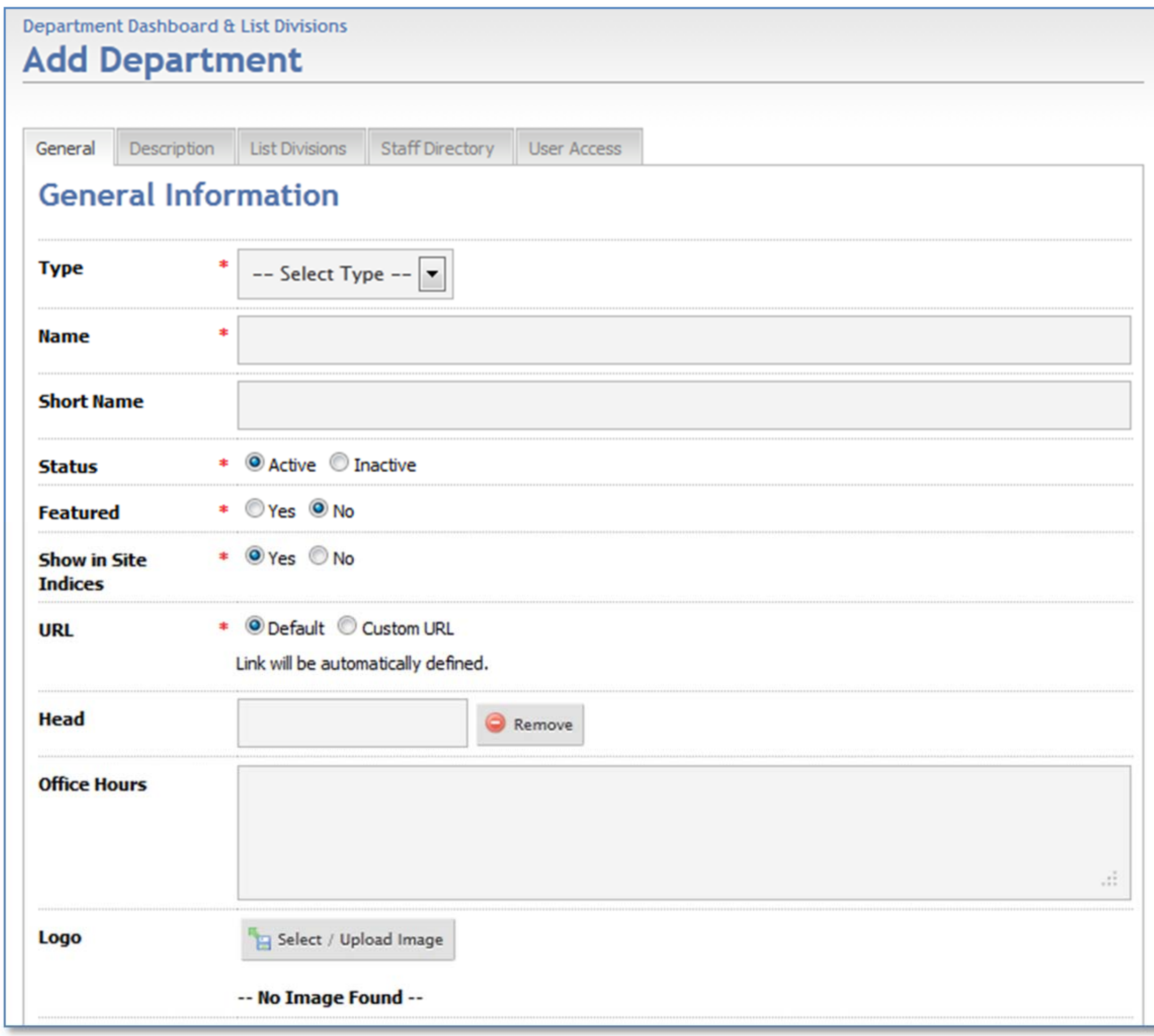
STRUCTURE

The “Structure” function in the left-hand navigation groups content related to the primary organizational structure of your website. Here you will see four items familiar to users – Departments, Divisions, Categories & Subcategories along with four new additions to the Structure area – Topics, Subtopics, Locations & Facilities.

Departments & Divisions

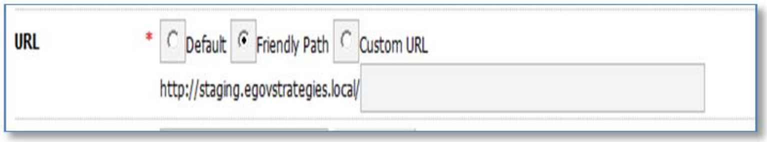
Just as in previous versions of the eGov Manager, a ‘**Department**’ represents a major entity within the overall structure of local government (i.e. Mayor’s Office, County Commissioners, Parks Department, Street Department, Health Department).

Note that when you Add or Modify a department, you now will get an application dashboard that provides quick access to related content – Descriptions, Divisions, Staff Directory, Users.

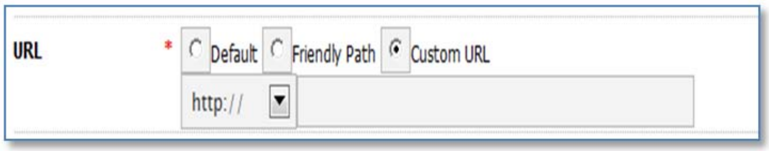


Enhancements for Departments & Divisions in v6 include the following features:

URL - One expanded feature is the URL field. A default URL is automatically generated unless you choose *'Friendly Path'* (creates a user-friendly synonym for this page) or *'Custom URL'* (allows you to enter a new destination for this page).

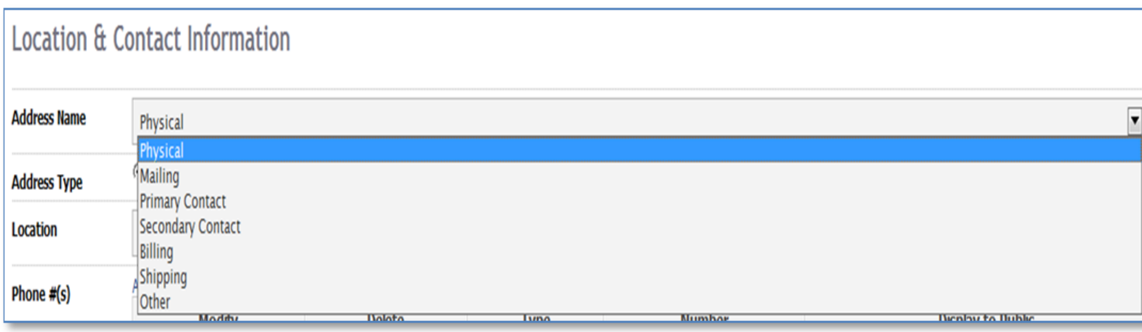


'Friendly Path' creates a 'shortcut' URL based on your website domain (e.g. www.city.com/Clerk).



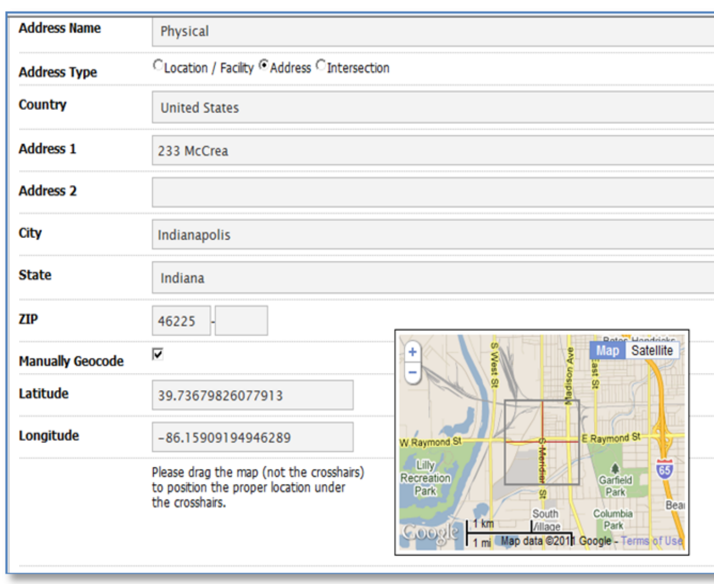
'Custom URL' orders any link to this page to go to an alternative URL (e.g. an external link).

Location & Contact Information – You can now select multiple addresses for various types of eGov content – Departments, Divisions, Topics, Users, etc. The Address Type enables users to associate a type of address for each address entry.

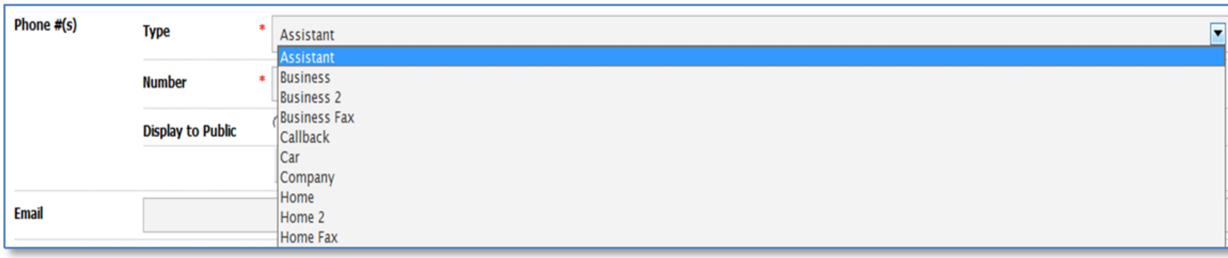


Manually Geocode – When utilizing '*Manually Geocode'* you can drag the map to the specific point which aligns with your accurate address or intersection.

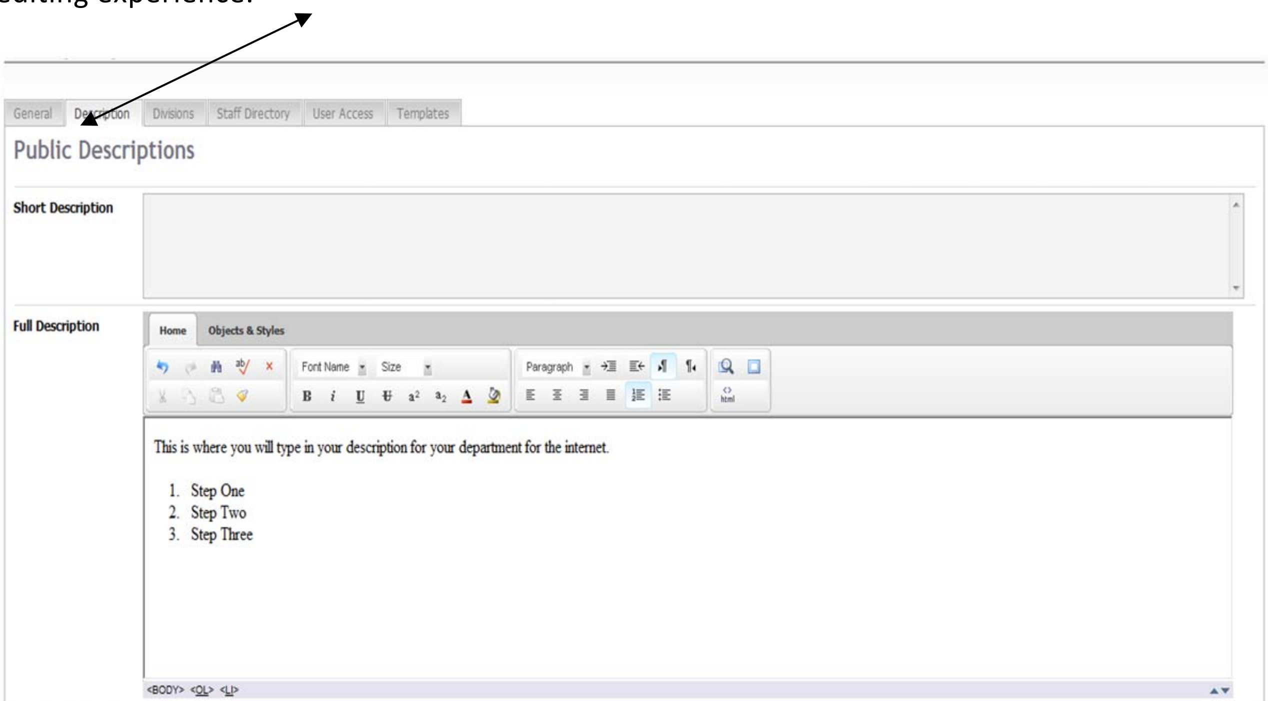
Use the '+ or –' to zoom in and zoom out. **NOTE:** when using this feature <u>you will drag the map</u> and not the crosshair to position your address or intersection.



Phone Numbers – Similar to addresses, you also have the ability to associate multiple phone numbers and specific types of numbers – Assistant, Business, etc.

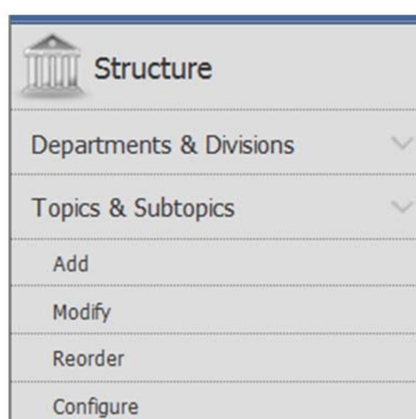


Tabbed View – the application dashboard makes it easier to see the types of content that can be associated with a Department AND makes pages shorter overall – thus improving your editing experience.



Topics & Subtopics

Topics & Subtopics are new options under Structure designed to provide users who have more complex department structures (e.g. a division with multiple sections under it) to better organize their content.

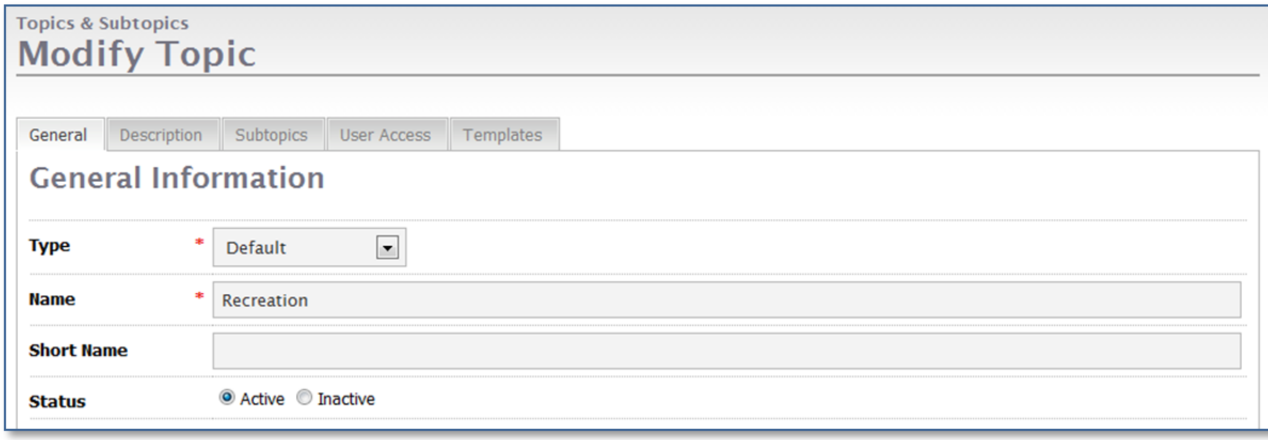


They offer two specific advantages:

- A Topic can be associated to multiple Departments. Remember that a Division can only be associated to a single Department;

- A Topic can have Subtopics. Thus, you can create a 3-level hierarchy within your department page – e.g. Public Works with a Topic for Recycling and Recycling can have multiple subtopics like Recycling Sites, Recycling Policies, etc.

When users Add a Topic or Modify an existing one, they will see a tabbed interface for this application that brings together a multitude of information related to that topic – Name, Status, Description, Subtopics and Authorized Users.



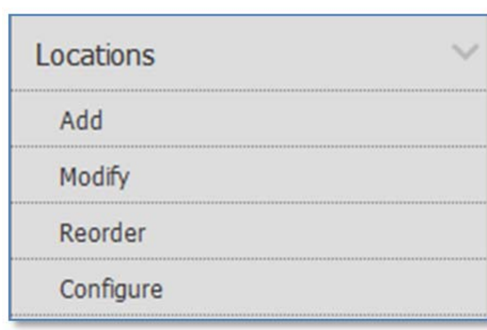
The tabs aggregate content related to this Topic. They include:

- **General –** General information about the Topic (name, status, topic type, associated URL, access rights, department & division association, automatic activation and expiration);
- **Description –** Areas for public and Intranet descriptions;
- **Subtopics –** Add Subtopics here – they will be automatically associated to this Topic;
- **User Access –** Add new or associate existing users so they can edit your Topic;
- **Templates –** (this is a placeholder for future functionality)

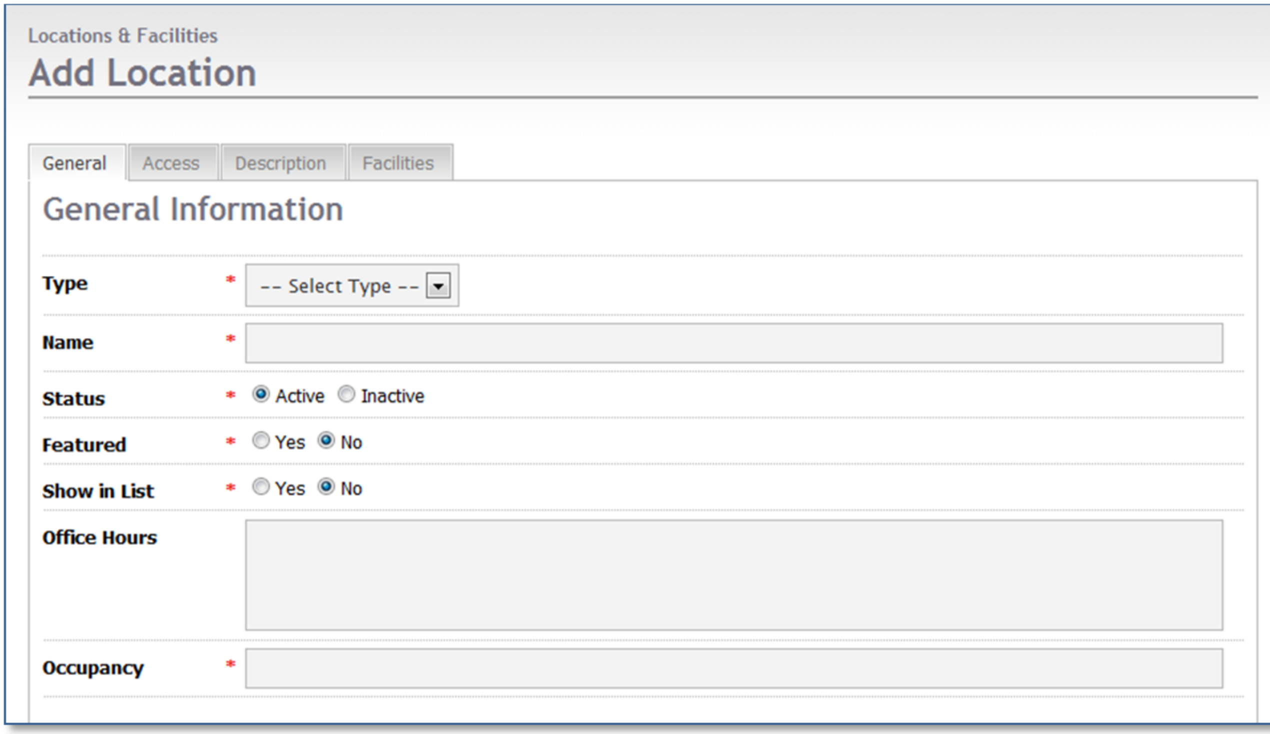
Locations & Facilities

For authorized users, Locations & Facilities can now be administered via the Structure function in the left-hand navigation.

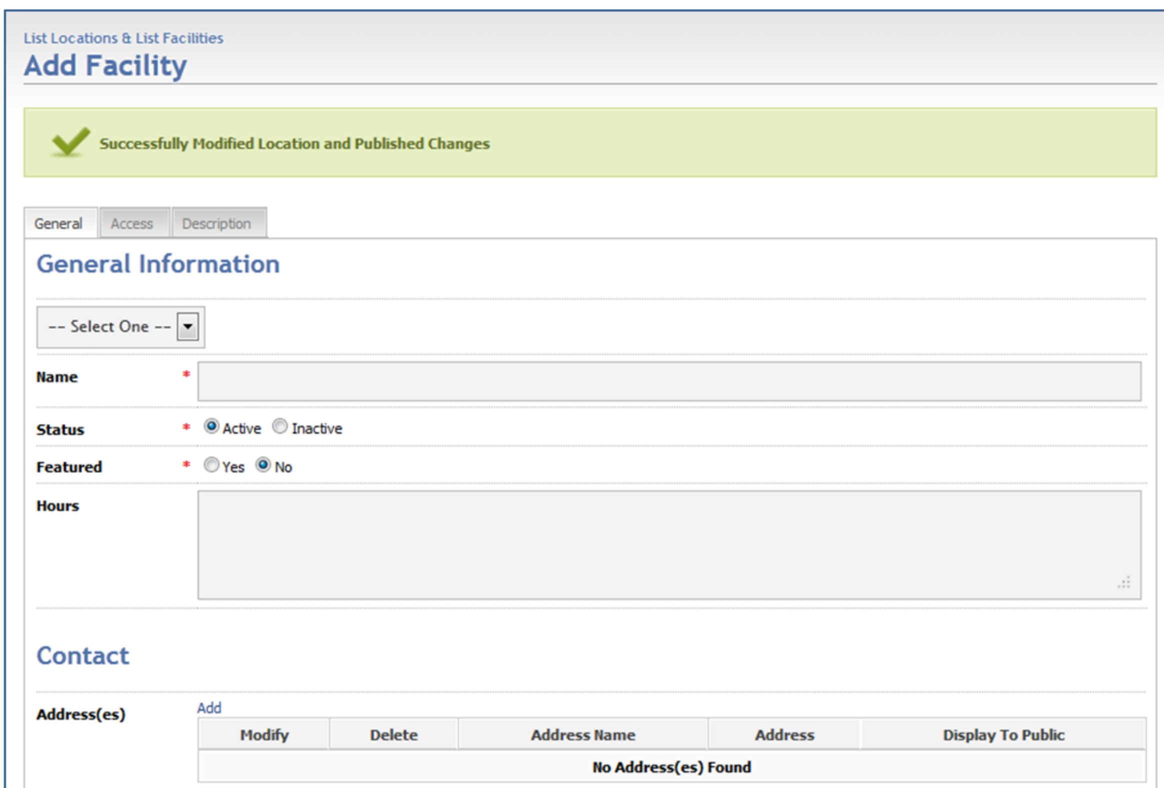
In general, functionality is similar to that in v5.



When users Add a Location or Modify an existing Location, they will see a new tabbed interface that brings together a multitude of information related to that Location – General information (name, status, hours, etc.); Access; Description; and Facilities. The Locations application dashboard makes it easier to get to all information related to a Location.



When a user chooses a Facility, they will be presented with an additional application dashboard for Facilities with tabs for General information, Access & Description.



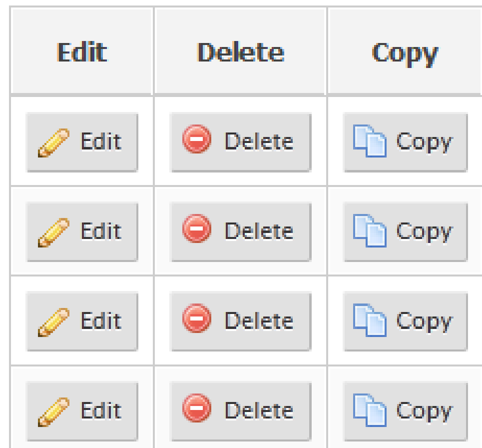
CONTENT

The Content function contains applications that enable you to manage content for your website. Each of the content applications is integrated into your website by associating it to a Structure element – e.g. to one or more of the following pages: Departments, Divisions, Topics, Subtopics, Categories and/or Subcategories.

Each of the applications within the Content function has been redesigned to take advantage of several new features:

Copy Feature

The "copy" feature is now included with all applications under the Content and Services functions. When a user selects Copy, they are taken to the Modify screen for that application and all associations will be preserved.



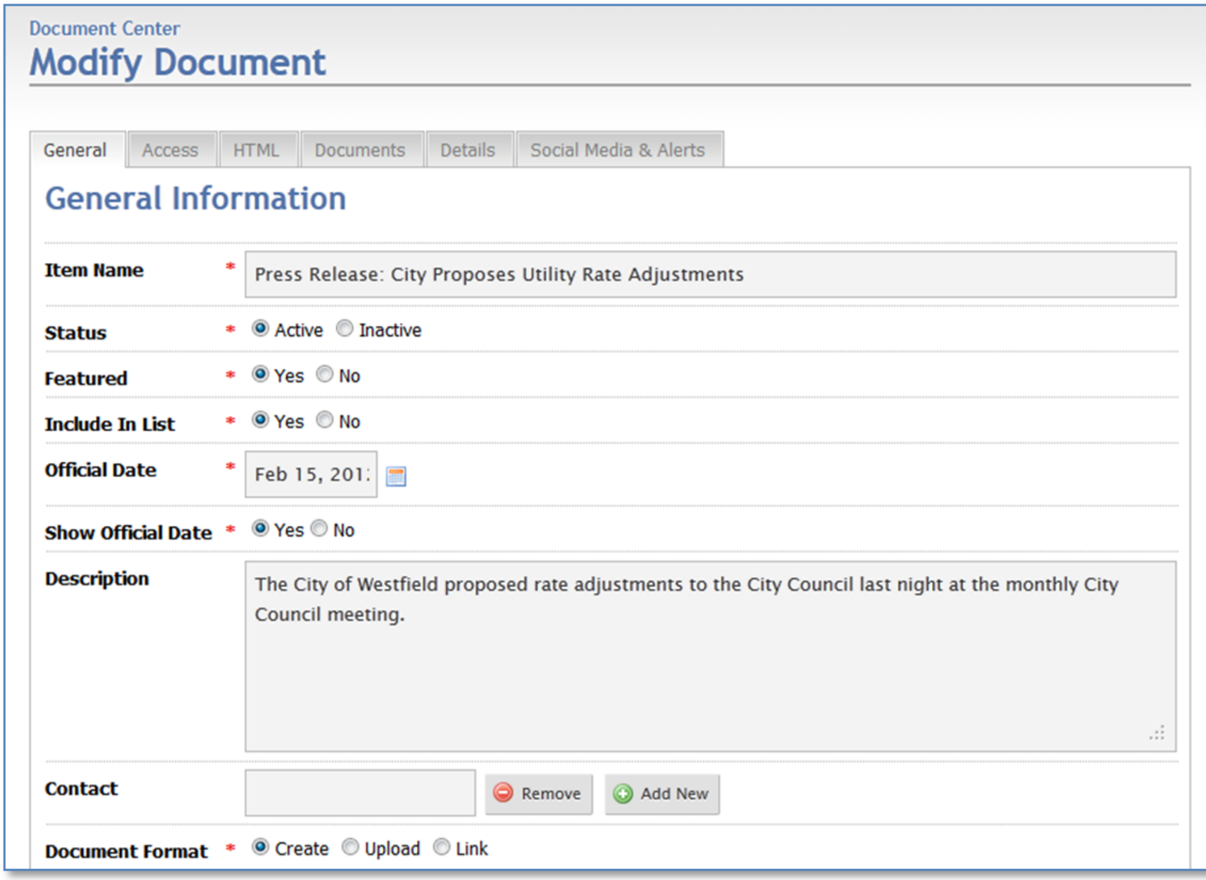
For example, if you need to upload a Parks & Recreation news release, select copy in front of a previous news release and you will not need to adjust the document type, Department or Topic classifications.

Dashboards

All of the Content applications have been rewritten to utilize the application dashboard concept. Tabs that are now accessible when viewing Documents, Events, Services, FAQs, and many more include:

- **General –** name, status, description, etc.
- **Access –** whether this is a Public document or restricted access
- **Description –** an area for the full description of this specific document, event, etc.
- **Social Media & Alerts –** send alerts to social media or via e-notify immediately

A screenshot of the new tabbed interface for the Document Center is shown on the next page.



Posting to Social Media

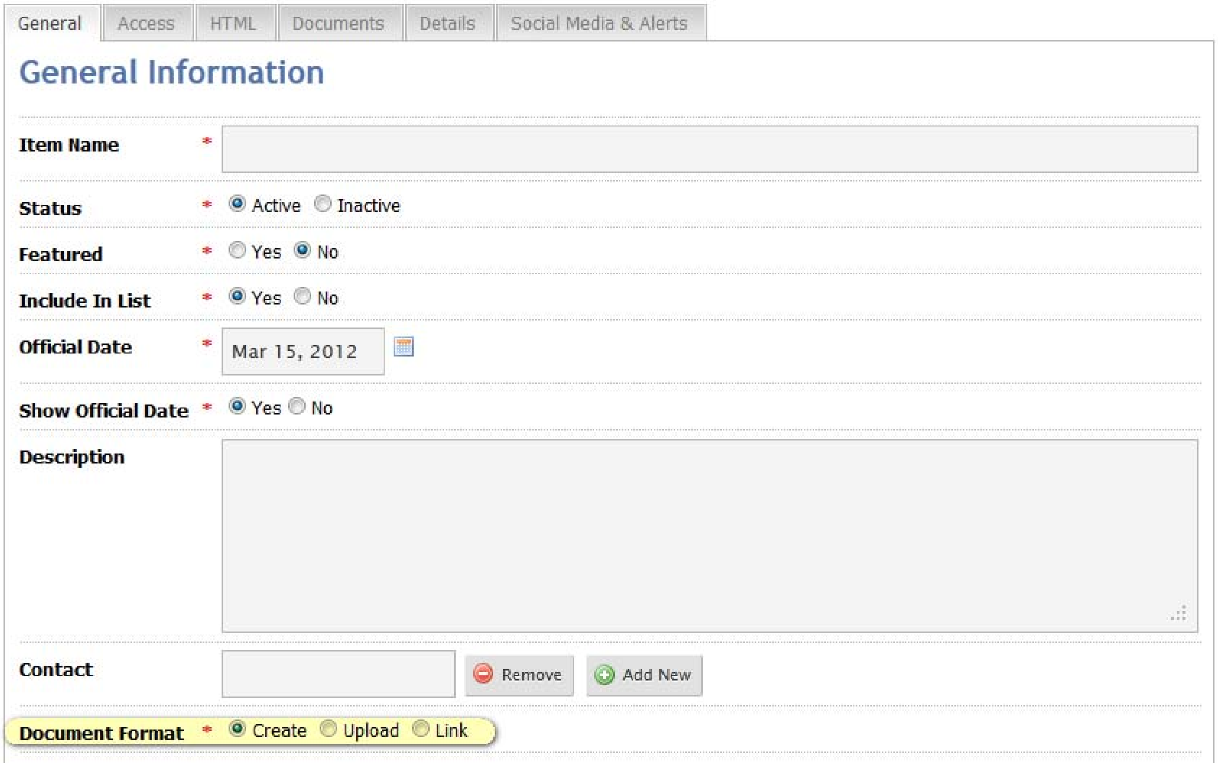
The **Social Media & Alerts** tab within the Dashboard enables you to post a message and a link to the content item that you're creating or modifying to a social media site like Facebook or Twitter. When you're done creating or modifying your document, event, service, etc., select the Social Media & Alerts tab and follow the instructions.

Note that if you have not been granted access to any social media publishing functions, you will not be able to utilize this tab.

Using Add to Create, Upload or Link

Another significant change is that you no longer choose what format your document should use – rather, you modify its format within the General tab (e.g., Create, Upload or Link). This improvement means that you can more easily modify the format of the document – e.g., go from an uploaded document to a linked document on a state website – without having to recreate the document in the new format.

Look for the Format Type within the General tab of the Document Center application (see the yellow highlighted section in the screenshot below):



Adding Associated Documents Using Create

Just as in earlier versions of the eGov Manager, you can add “Associated Documents” when you use the “Create” feature when creating a document. An example of when you would do this could include one of the following scenarios:

- Adding a Comprehensive Plan and uploading each Chapter as its own PDF document
- Adding a News Release and then adding an Application Form and a PDF map

Follow these steps to create a document with Associated Documents:

1. Complete the **General** tab for Document Name, classification, etc;

2. Complete the **HTML** tab by:
    a. choosing a Page template and a Document template
    b. Adding a general description in the Content area (e.g. an overview of the Comprehensive Plan document or your press release would go here)

3. Add Associated Documents in the **Documents** tab.

    <u>Hint:</u> Each Associated Document is an “Item” in the Documents tab. Thus, you will select Add an Item, complete the Document Name, select Upload, Create, Link or Associate to bring in that document – and then hit Continue two times;

Recurring Events

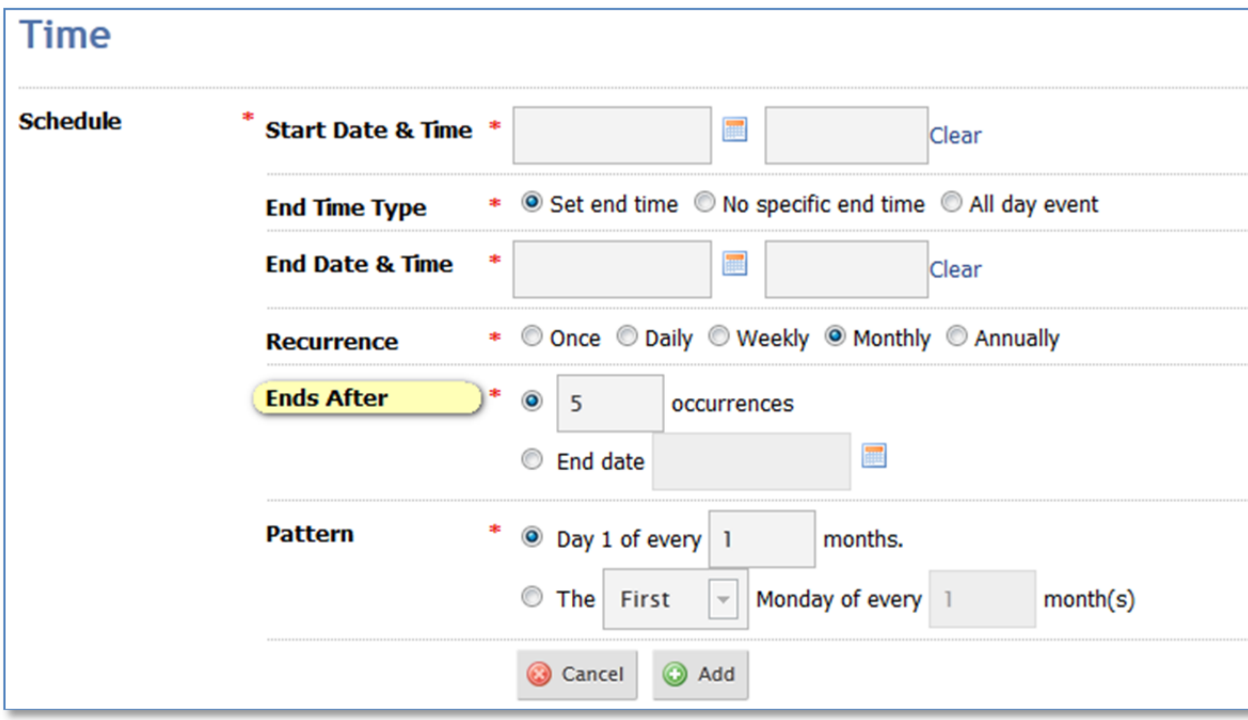
With v6, you can now add multiple recursion patterns for a single event. This feature was added to accommodate those users who have Council or Commissioner meetings that occur more than one time a month – e.g. on the 2nd and 4th Mondays. Here is how to use the new recurrence options:

- Select "Add" in the Time section

- Select a Recurrence pattern other than "Once"

- Choose one of the following recurrence setttings
    - Ends after (a number) of occurrences OR
    - Ends on a specific date

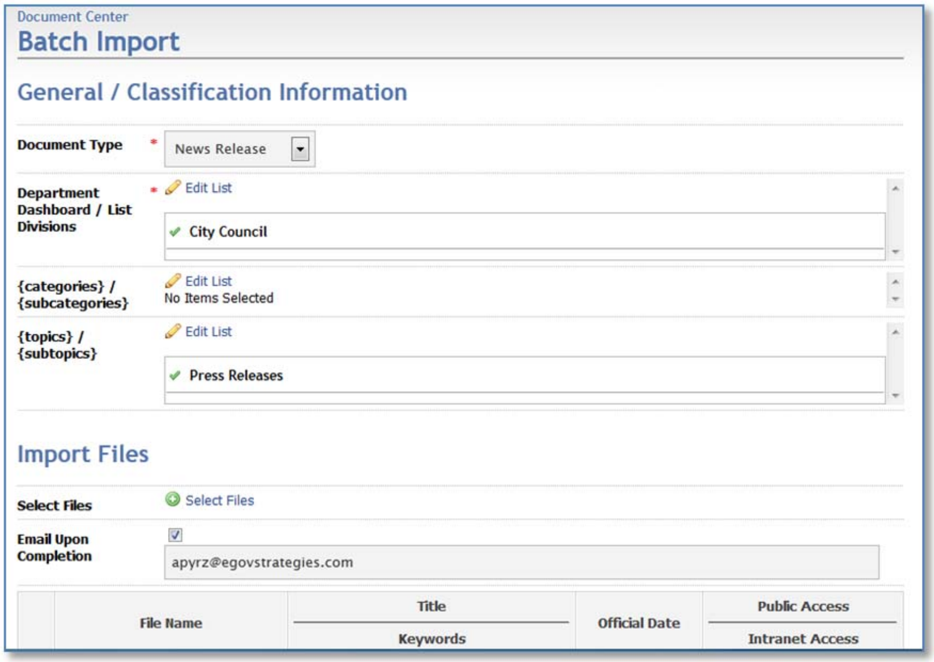
- Set the recurrence pattern.



Batch Upload for Documents & Images

The Document Center & Image Gallery applications each have a "Batch Upload" button.

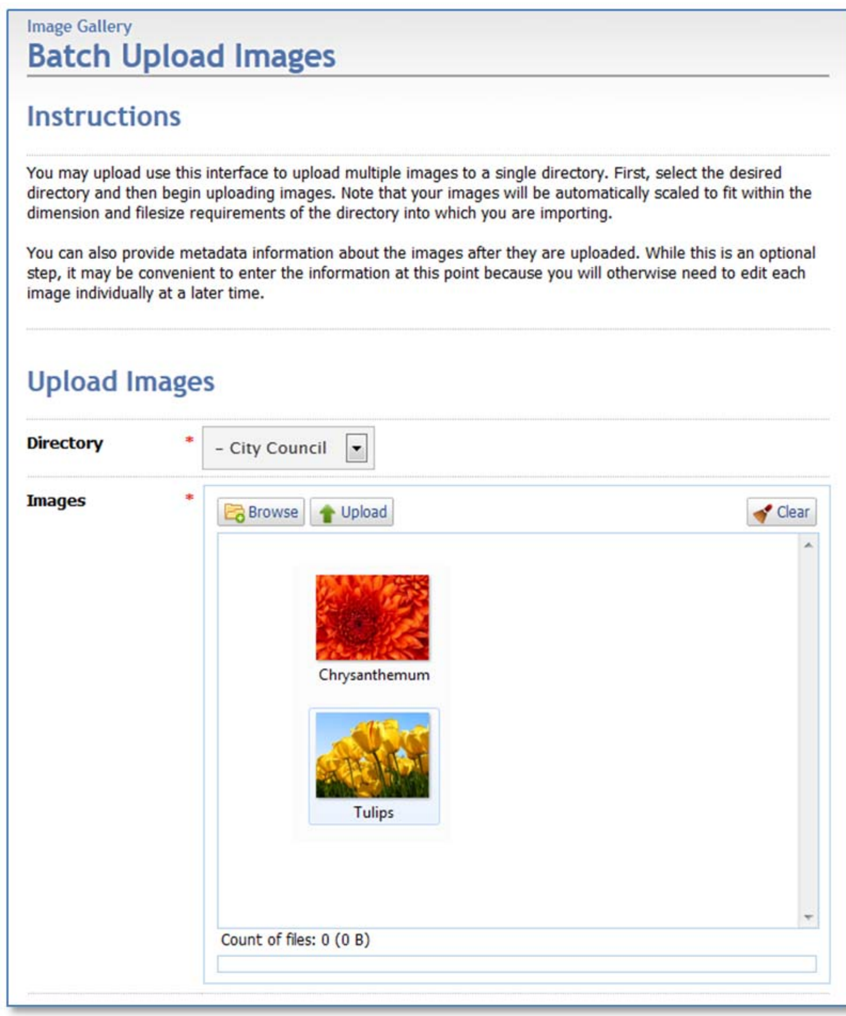
- For **Document Center**, documents will need to be loaded into an FTP directory. Classify the new documents and then select all files to be uploaded from the directory. File names, titles, keywords, and more can be modified after uploading. Please contact eGov support for assistance in setting up your batch upload directory.



- For **Image Gallery,** images can be uploaded directly from your desktop or from another location accessible from your PC.

  Simply select the Batch Upload option under Image Gallery and open the folder on your PC where the target images are located.

  You can drag the images right into the window or use the Browse feature to upload the files.

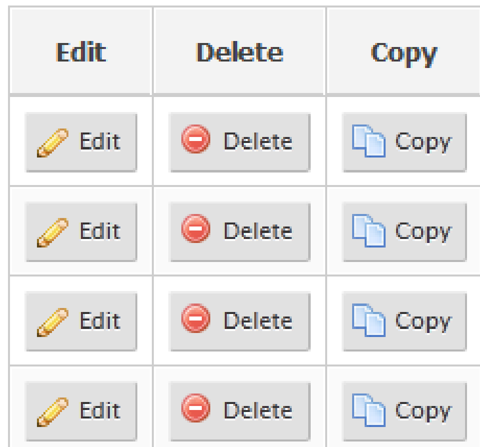


SERVICES

The Services function contains applications that enable you to manage interactive services for your website. Each of the applications is integrated into your website by associating it to a Structure element – e.g. to one or more of the following pages: Departments, Divisions, Topics, Subtopics, Categories and/or Subcategories. Each Services application will also have its own "landing page" where you can see all of the services available within your website regardless of Department, Division, Topic, etc.

Each of the applications within the Services function has been redesigned to take advantage of several new features:

Copy Feature



The "copy" feature is now included with all applications under the Content and Services functions. When a user selects Copy, they are taken to the Modify screen for that application and all associations will be preserved.

For example, if you need to upload a Parks & Recreation news release, select copy in front of a previous news release and you will not need to adjust the document type, Department or Topic classifications.

Dashboards

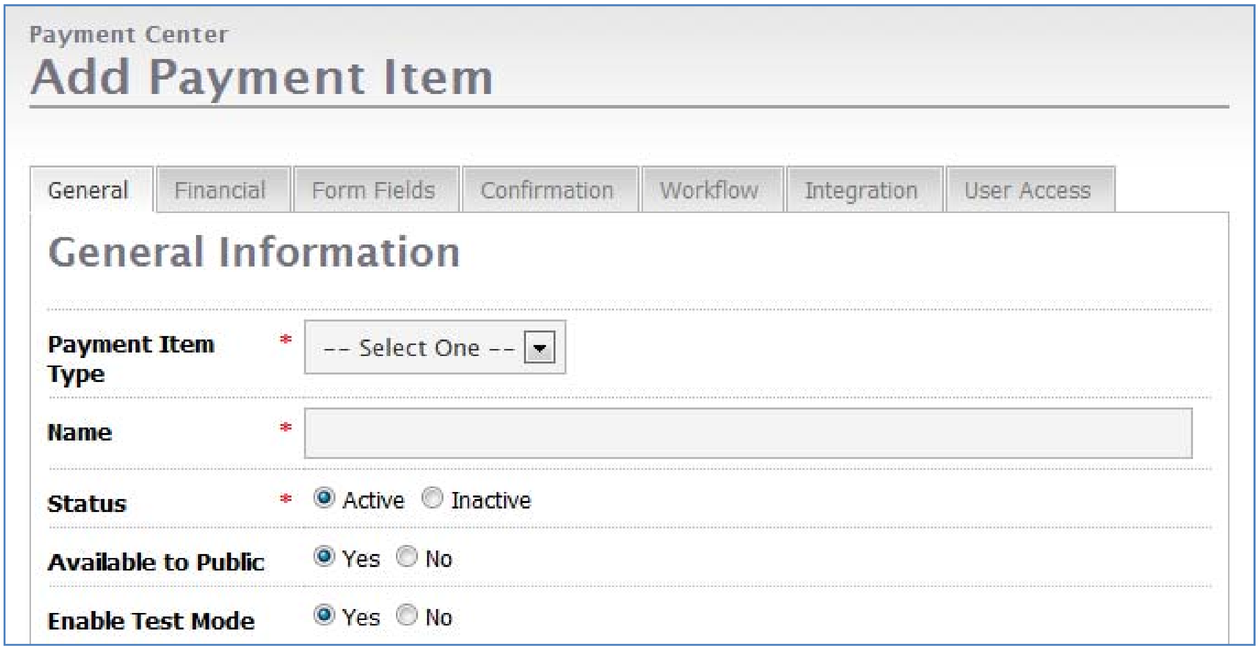
All of the Services applications have been rewritten to utilize the application dashboard concept. Tabs that are now accessible when viewing Action Items, Payment Items, Programs, and many more include:

- **General –** name, status, description, etc.
- **Financial –** what merchant accounts are associated with any related payments
- **Form Fields –** build drop-down menus, multi-line text boxes and
- **Workflow –** associate custom workflow for handling this item
- **Integration –** an area for programming any initial landing pages or backend interfaces
- **User Access –** establishing who has access to this specific form

See the screenshot on the following page.

Workflow for Action Center & Payment Center

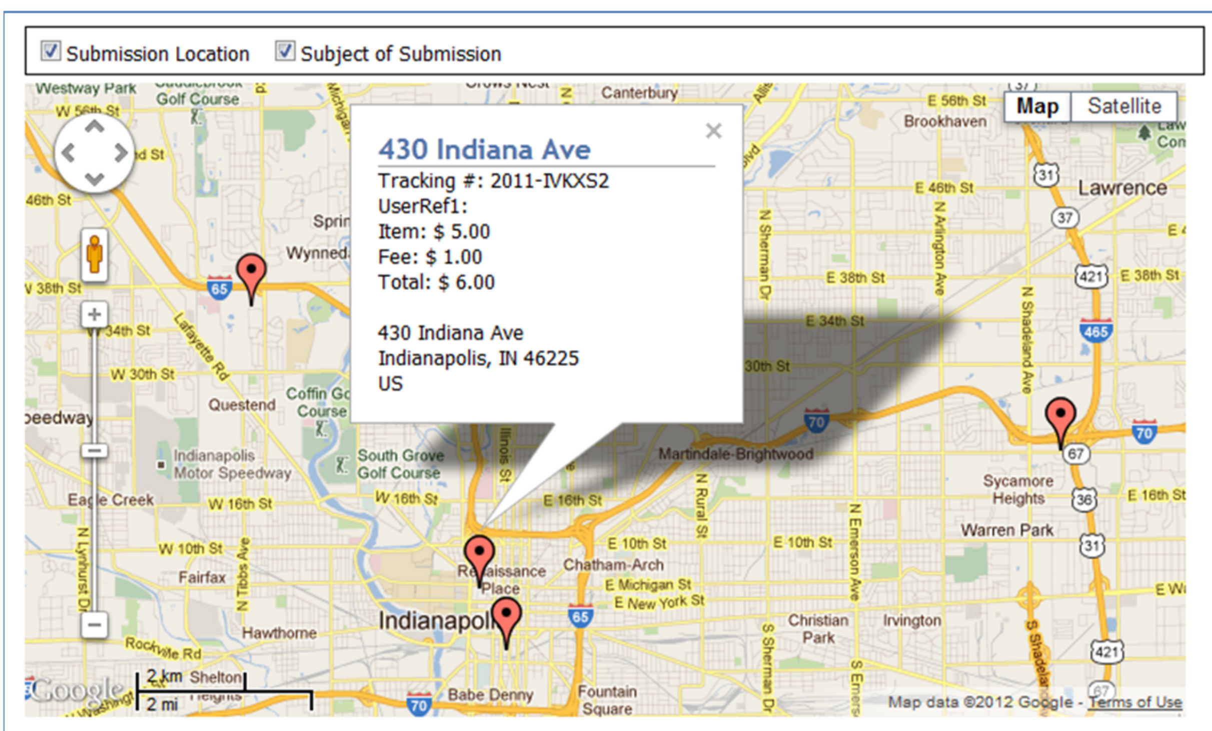
An additional tab now appears in the application dashboard for Action Center & Payment Center that enables you to associate a custom workflow to a specific Action Center or Payment Center item. Please see the "Settings" section for more information on creating these workflows. You will use the Workflow tab to associate one of the created Workflows to the Service that you are creating or modifying.



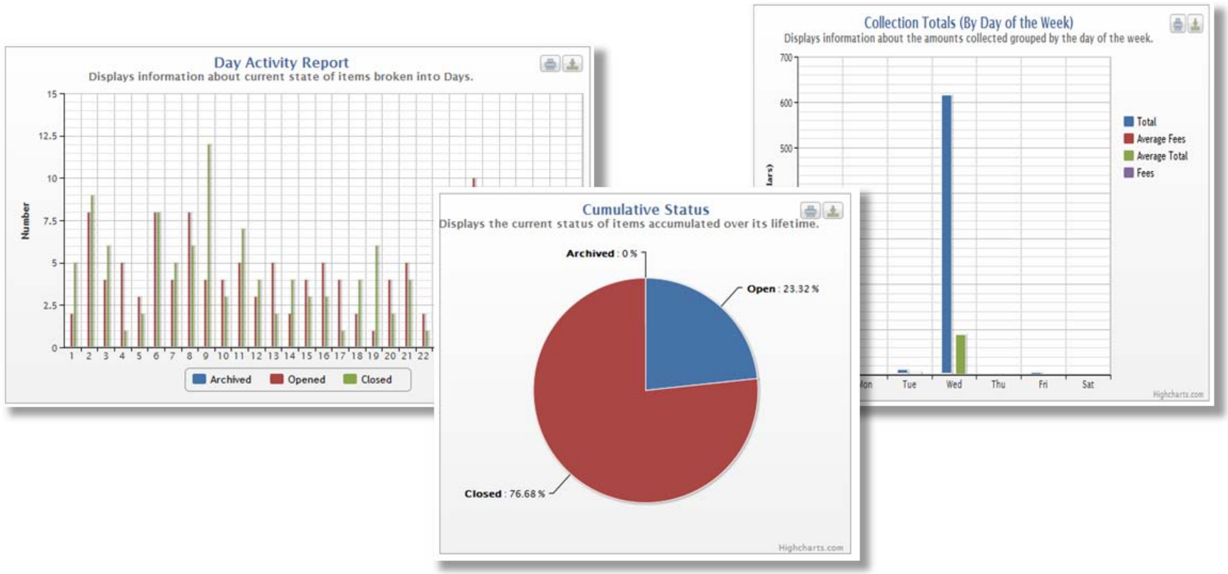
Advanced Reporting for Services

A new reporting interface provides additional reporting options for both Action Center and Payment Center. Choose **Status** under either the Action Center or Payment Center applications to access the new reporting interface. The 3 reporting options are:

- **Map Report** – plot all submissions per the filtering above (options for filtering include Date Range, Receipt #, Name, Email or Item);



- **Graph Report** – new charts and graphs provide a myriad of details;



- **Download Report** – download items according to filter to a CSV format so you can analyze in MS Excel; or

- **Run Report** – lists all of the results based on your filter criteria below.

SOCIAL MEDIA & ALERTS

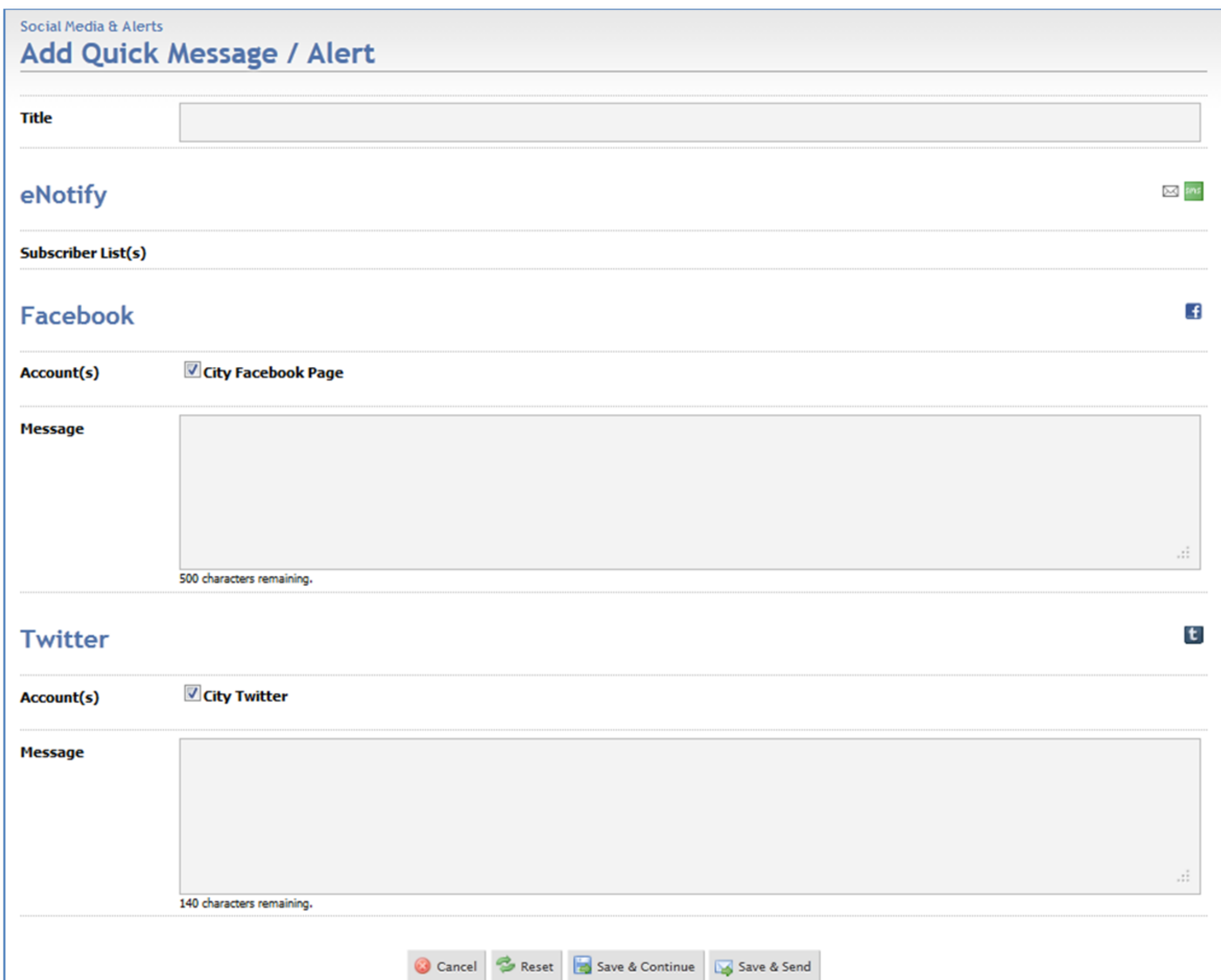
RSS Feeds

Your new website is completely powered by Atom feeds that can be easily "consumed" by Internet devises that read RSS feeds. This section will ultimately enable you to quickly create custom RSS feeds.

If you need a specific feed, please email us at support@egovstrategies.com or submit a Question under the Assistance area within the eGov Manager and we will help you generate the feed that you need.

Messages

As discussed in the Content section, a number of those applications have a tab for generating postings to your social media accounts – e.g. Facebook & Twitter. If you would like to simply generate a posting to a social media account without adding new content, you can do that through the Social Medial & Alerts function.



Note that you will be asked to provide the following:

- A title for your Quick Message that you can use to modify at a later date. Note that the system allows you to "Save & Continue" if you would like to send at a later date or you can choose "Save & Send" to post your message immediately;

- The "Message" areas under the two social media accounts enable you to specifically customize the message for each target social media outlet.

Future enhancements include the following:

1. Ability to schedule the sending of social media messages at some future point in time;

2. Ability to generate short links to related content (e.g. to a News Release that you've posted); and

3. Tracking of all social media posts so that you can understand where your message is being heard.

To configure your social media interfaces, see the "Social Networking" application under the "Settings" function in the left-hand navigation.

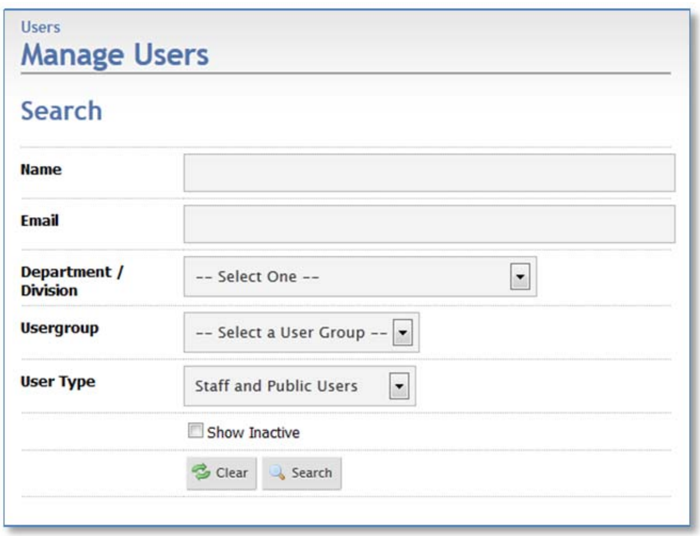
USERS

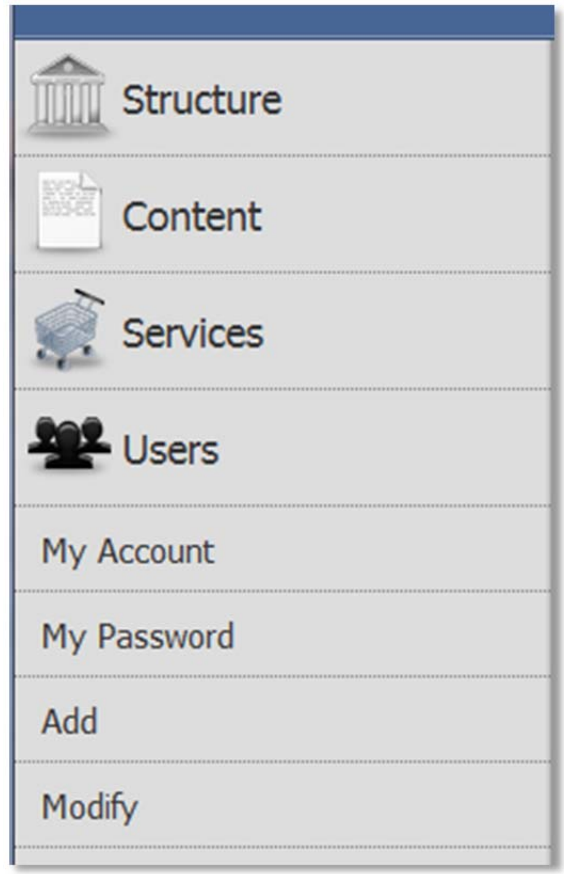
The "Structure" function in the left-hand navigation groups content related to the primary organizational structure of your website. Here you will see four items familiar to users – Departments, Divisions, Categories & Subcategories along with four new additions to the Structure area – Topics, Subtopics, Locations & Facilities.

User Management

The Users function in the left-hand navigation features drop-down items for modifying your account information and password and adding and modifying users (see graphic on the right).

Note that a new interface (see graphic below) provides more options for filtering Users by Department, Usergroup (e.g. Administrator, Content Provider) or User Type (Staff, Public, etc.).

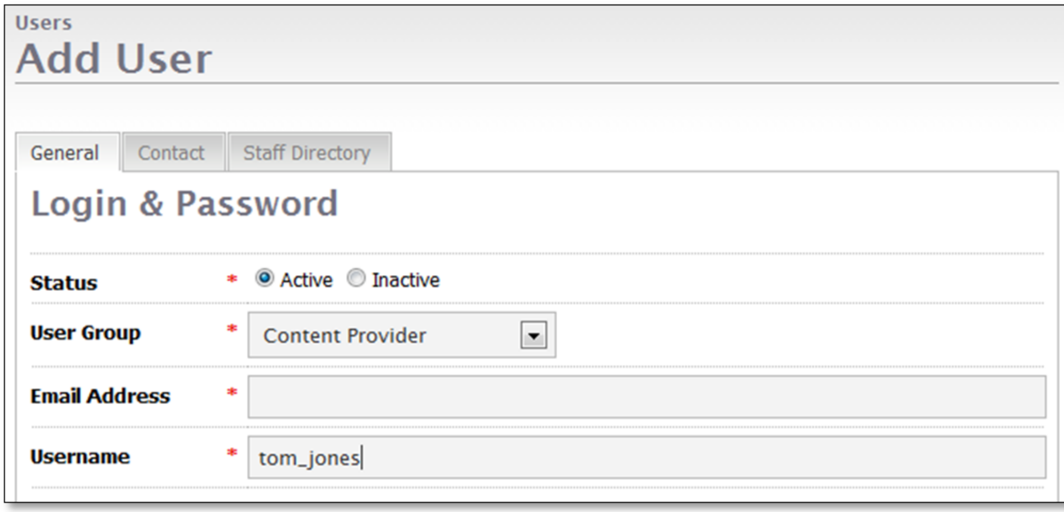




If you select Add from the Functions area or modify a specific user, the center of the page will refresh and you will be forwarded to the new tabbed interface that is the *application dashboard* for Users. The tabs allow users to modify:

- <u>General information</u> – add name, email, username and staff directory fields;
- <u>Contact information</u> – add multiple phone numbers and addresses;
- <u>Staff Directory</u> – designate whether a user appears in the public staff directory;

A screenshot of the User application dashboard is provided below.


Users
Add User
General
Contact
Staff Directory
Login & Password
Status
*
Active
Inactive
User Group
*
Content Provider
Email Address
*
Username
*
tom_jones

REPORTS

eGov will be consolidating various reporting features from the Action Center and Payment Center and will be adding additional reports regarding content changes, user activity and site statistics for your website.

This section of eGov Manager v6 has not yet completed our system testing.

SETTINGS

The Settings function enables Webmasters to configure a variety of settings for your eGov Manager instance.

General Information

We have expanded the number of settings that can be controlled by Webmasters significantly. In addition to manage general information about the organization, this section has areas for adjusting settings for the following:

- **Geocoding information** – used within the Map Builder and the Locations & Facilities Directory as the starting location for the location of your organization;

- **Structure –** in addition to being able to change the names of Departments, Divisions, Topics, Subtopics, etc., you now can control who can edit these specific items.

  For example, in previous versions, only Administrators could change the Description within a Department. By adjusting the "Departments Editable By" setting, you can allow Content Providers access to that content.

- **Display Settings –** in response to feedback on how the Intranet functions, we've added settings to control the display of Intranet data and have given Webmasters and our designers the capability to control the maximum size of images within the website.

Security Settings

This application enables you to select various security settings for your website, including the level at which you use 1) CAPTCHA for Action Center forms or for staff logins to the eGov Manager; 2) lockout settings and login failures for those logging into the eGov Manager; 3) lockout settings and login failures for access to citizen-facing secure access points (like E-Notify registration or your Extranet); and 4) role-based edit values for various content types.

Social Networking

The eGov Manager enables you to add integrations to your favorite social media websites quickly and easily.

1. Select **"Add Integration"** from the Social Networking landing page;

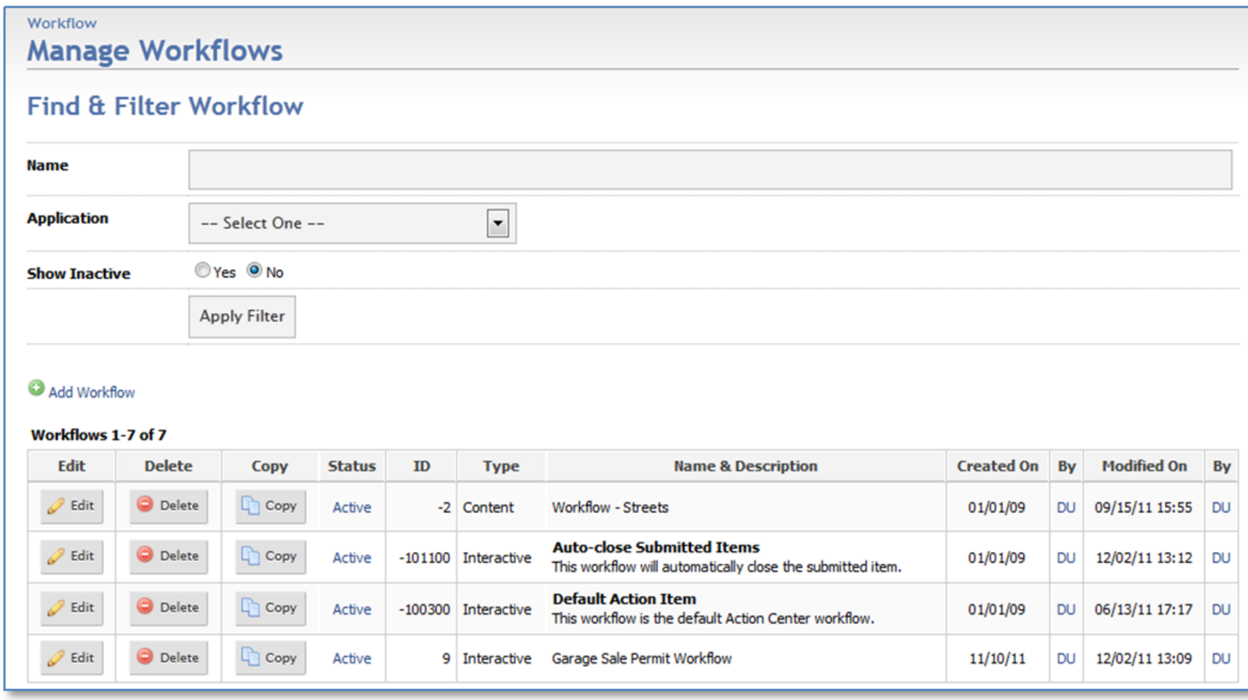
2. Give the Integration an appropriate title (e.g. Police Department Facebook) and assign access to specific departments;

3. Select the appropriate **"Integration API"** value for the social media site to which you are integrating. If you do not see the social media site you need, please contact eGov Strategies Support at support@egovstrategies.com.

Workflow

The Workflow application enables authorized users to create and assign workflow to various other applications including Action Center & Payment Center. At a future point in time, eGov will enable Workflow to control content publishing (e.g. for content approval processing).

The Workflow button takes to a page that lists current Workflows (likely, several default workflows will have already been created). You can either modify, delete or copy a Workflow via the action buttons in front of each item.

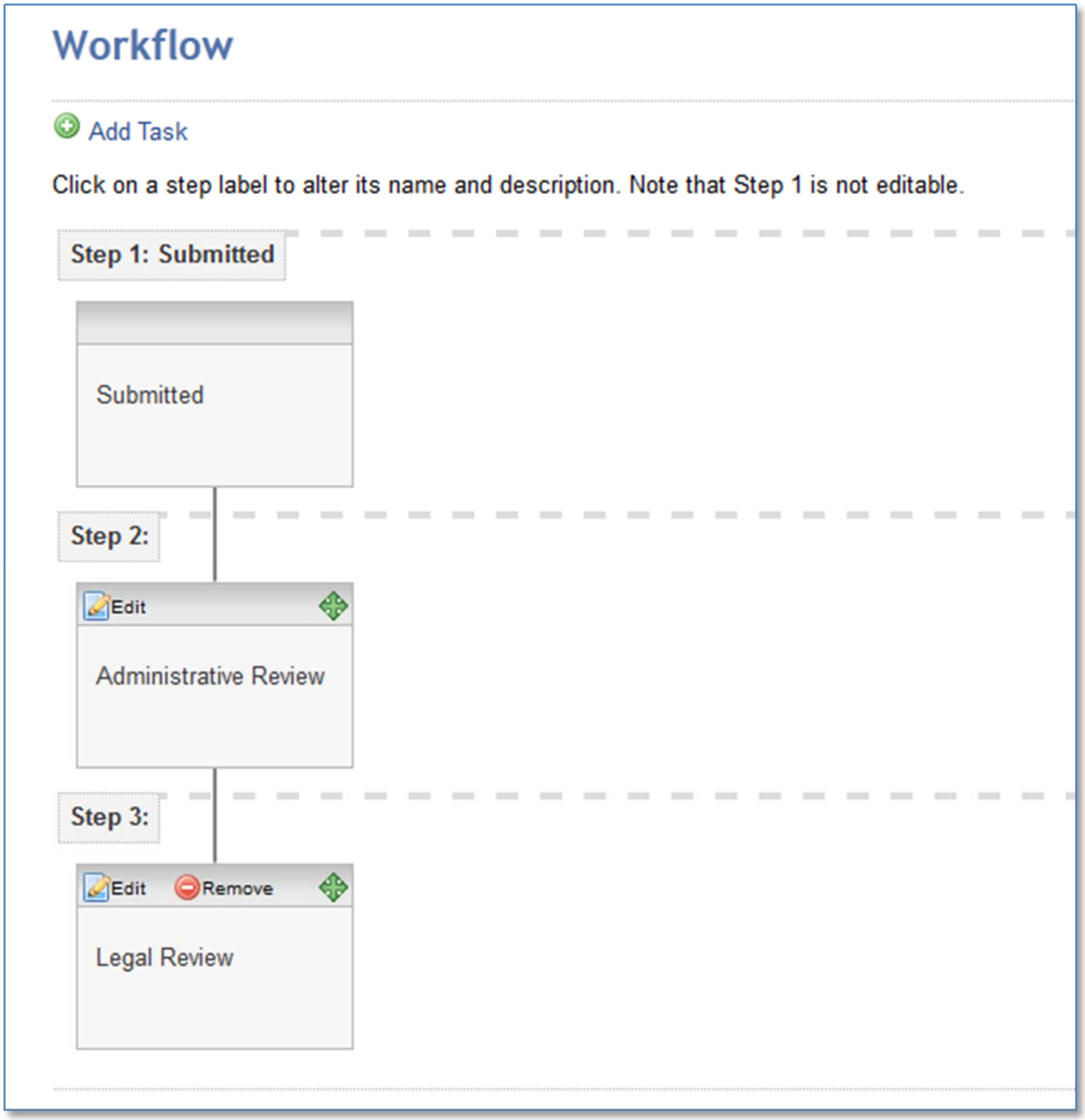


The following options are available when adding or modifying a Workflow:

- **General –** Associate this workflow to Interactive Items (e.g. Payment Center and Action Center) or to Content Management. Set the Workflow active and provide description;

- **Workflow –** Add Tasks to your Workflow that logically represents steps in the process. You will be prompted to order this task after or before other tasks. **Note that the last Step is always the RESOLVED state.** See sample screen shot on next page.

- **Associations –** Associate this Workflow to specific departments (e.g. so that the Public Works Department may assign it to their work items) and to specific Applications (e.g. like the Action Center).

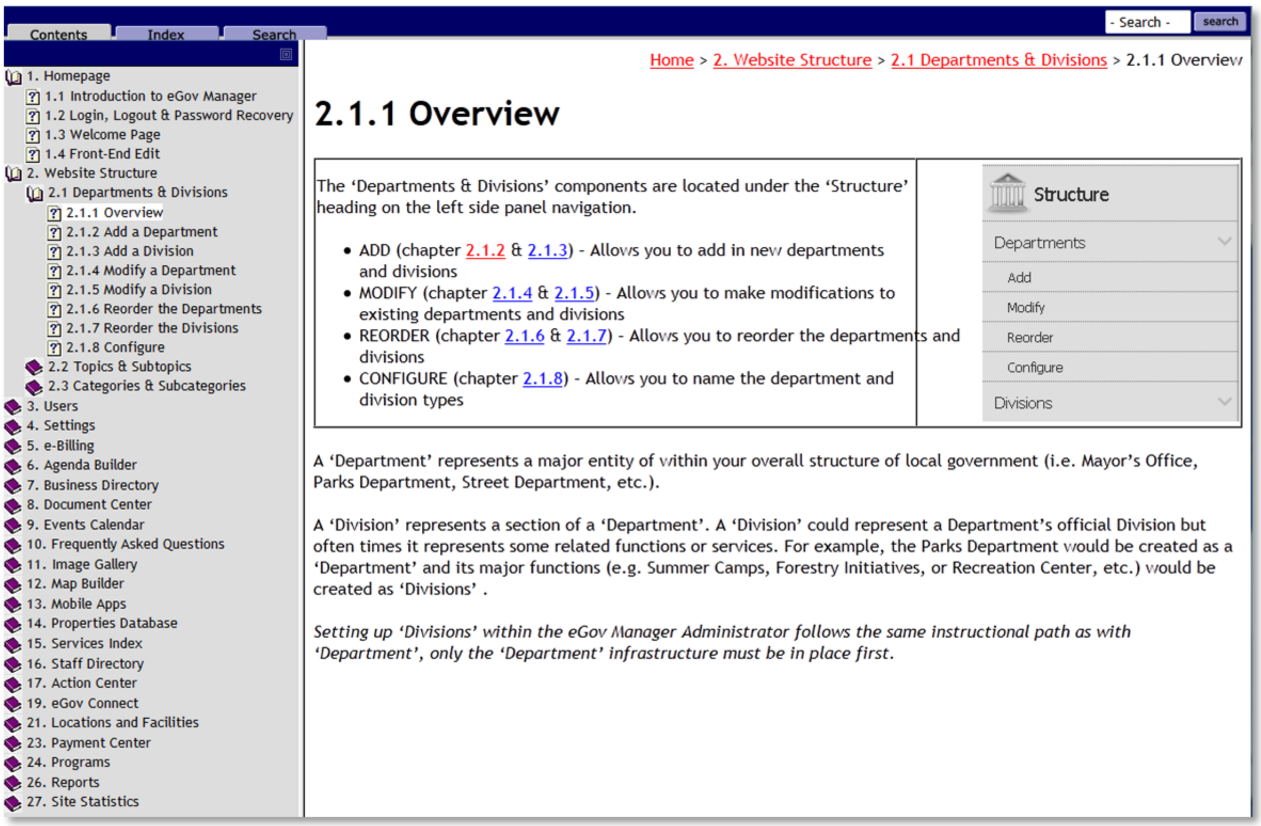


ASSISTANCE

Use the Assistance area within the left-hand navigation to gain quick access to a variety of instructional materials.

eGov Manager Help

The eGov Manager includes a comprehensive User Guide that is index-able and searchable. The guide is organized along the lines of applications within the eGov Manager but also has sections related to Front-End Edit and Website Structure.



eGov Training Videos

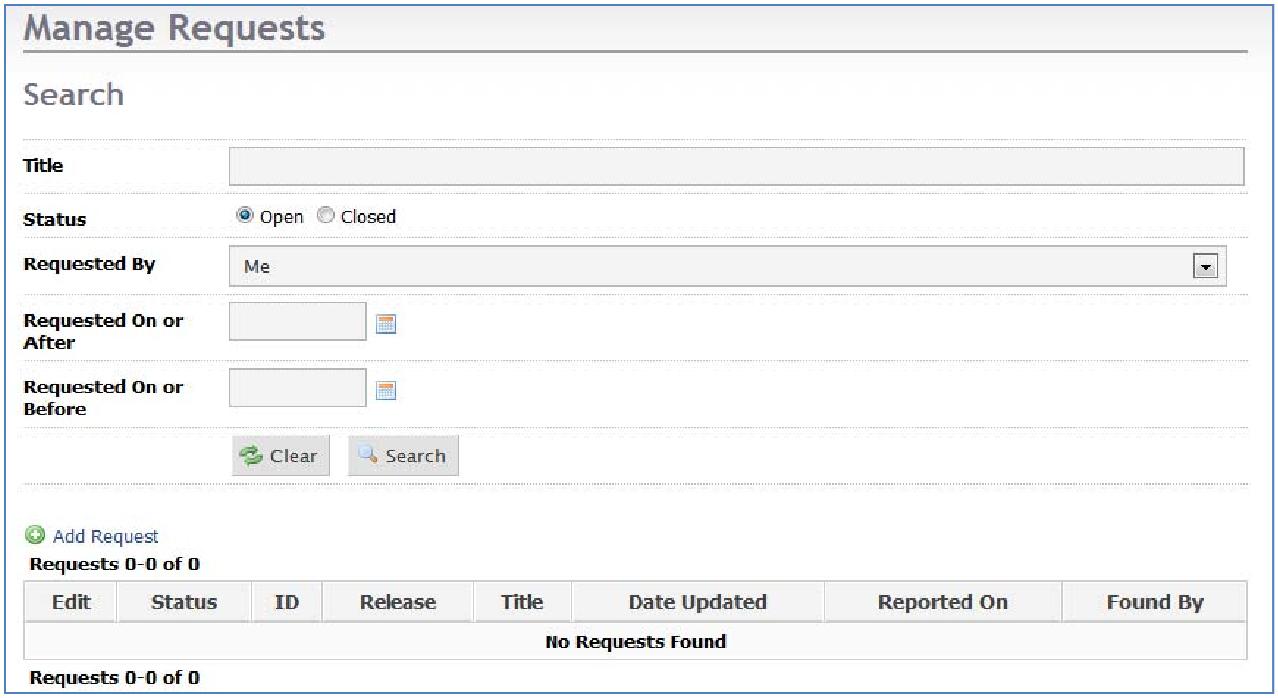
Increasingly, eGov will be providing on-demand access to Training Videos related to using features of the eGov Manager.

Submit a Question, Defect or Feature Request

In the near future, users of the eGov Manager will be able to ask questions, request features or report defects through the eGov Manager. These three options are currently available under the Assistance function drop-down, but the functionality is not yet available.

While any user can submit a bug request or feature request, these will ONLY be forwarded on to eGov for review if they are approved by someone within the site with Webmaster access.

In addition to reporting, eGov Manager users will be able to track their requests online.   and



Join an Online Meeting

If you're working with an eGov Strategies Support person and either you need to share your screen or you need to see theirs, this link will take you to eGov's partner website that we use for webinars.

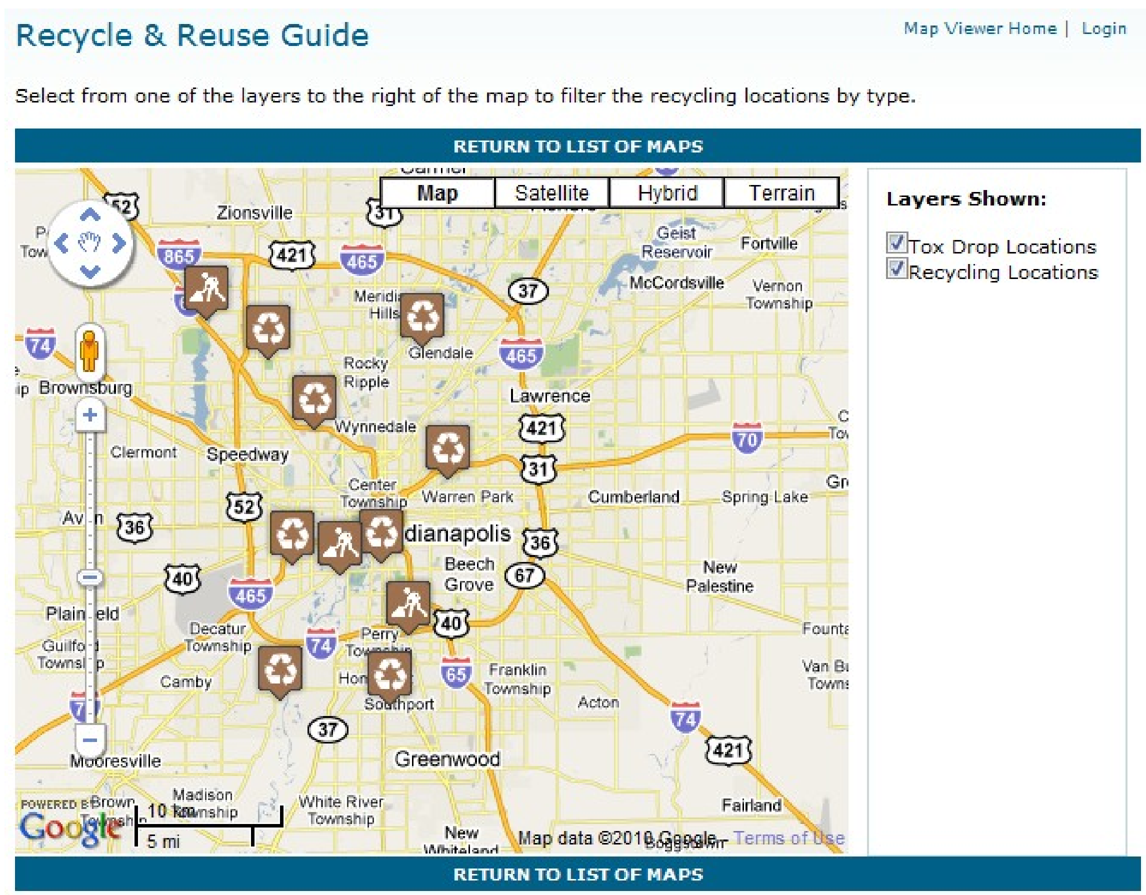
ADDITIONAL TOOLS

The following section identifies some additional web applications that may not be a part of your specific eGov Manager configuration. Please contact sales@egovstrategies.com if you would like to discuss adding any of these features to your website initiative.

Map Builder

The eGov Manager Map Builder enables you to create and manage your own interactive maps. You can easily add points to your map, draw lines or districts or upload data from your GIS system via our KML upload feature to create interactive maps with map elements that are clickable.

A sample recycling map is show below:



E-Notify

The eGov Manager E-Notify system enables local governments to send email notifications to subscribers based on their areas of interest. This service eliminates the need to maintain lists for Council meeting documents and keeps all constituents informed on the latest news from your organization.