EGOV MANAGER TRAINING MANUAL

FOR VERSION 6.0 - LAST UPDATED: 09/20/2013

INTRODUCTION

ABOUT THE EGOV MANAGER TRAINING MANUAL

This eGov Manager Training Manual was created to enable Clients to develop their own “train-the-trainer” sessions for the eGov Manager and/or to provide users with a “self-help” approach to learning the eGov Manager.

HELP SECTION WITHIN THE EGOV MANAGER

Throughout this guide, we will reference materials that are located within the eGov Manager Help section in the eGov Manager. You will need to have eGov Manager Access to utilize this information. Once you’re logged in, go here to find this section:

- In the eGov Manager’s left-hand navigation:
  - select “Assistance”
  - select “eGov Manager Help”

MORE ABOUT EGOV MANAGER HELP

This document provides a general overview of the purpose of specific features of the eGov Manager and how they work. We will then advise the reader to go to appropriate sections within the eGov Manager Help to get more specific and targeted training.

You will see references to the following sections of the eGov Manager Help:

- **START** – see the “Getting Started” section within the eGov Manager Help;

- **GUIDE** – see the “User Guide” section within the eGov Manager Help;

- **VIDEO** – see the “Video Tutorials” section – we will also provide a section number (e.g. “see Video for ‘Getting Started’ in Lesson 1)

This manual is designed to complement the User Guides and Training Videos that are available within the Help section of the eGov Manager. Thus, we recommend that when using this manual you make sure that you can login and view these materials as well.

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RESOURCES: USER GUIDES & VIDEOS

The following Videos and User Guides are referenced within this Training Manual. Please consult the eGov Manager Assistance section (eGov Manager Help) to view these resources:

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GENERAL TOPICS

The following section will feature **General Topics** related to using the eGov Manager. Key sections include:

- Accessing the eGov Manager
- eGov Manager Users & Staff Directory
- Front-End Edit Functionality
- Managing Design Elements
- Using the Intranet

ACCESSING THE EGOV MANAGER

The eGov Manager is the administrative tool that your organization will use to manage content and interactive services for your website.

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. Have a good understanding of browsers that provide the best results using eGov Manager;
2. Be able to reset both your username and password; and
3. Have a general understanding of the different functional areas within the eGov Manager. These are the main sections within the eGov Manager's ever-present left-hand navigation.

VIDEO: RESETTING YOUR USERNAME & PASSWORD

How to issue a request to have usernames and passwords emailed to official email addresses. If you've been configured for access – but don't have your login information – this short video will get you up and running.

GUIDE – EGOV V6 BASIC WEBSITE USER GUIDE (LOGGING IN)

See the "Logging In" section of the Basic Website User Guide to get a quick, comprehensive tutorial on resetting your username and password.

RECOMMENDED BROWSERS

The eGov Manager supports all of the major browsers (Internet Explorer, Chrome & Firefox) but is designed to work best with more advanced browsers like Mozilla Firefox & Google Chrome. The "Citizen" side of your website is optimized for all major browsers and citizens should see no major difference across the various browsers.

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However, when using the eGov Manager, our internal benchmarks suggest that Chrome & Firefox browsers can yield up to 10-15 second improvements over IE when doing sophisticated content management tasks (like adding a document or creating a Topic).

LOGGING INTO THE EGOV MANAGER

Citizen Side Access:
To access your website as a constituent would see it (the "Citizen Side"), use the link below:

your-website-domain
(e.g. www.nettown.us.gov)

eGov Manager Access:
The eGov Manager can be accessed from the "/manager" folder of the root of your website. To access the eGov Manager, use the link below:

your-website-domain/manager
(e.g. www.nettown.us.gov/manager)

USERNAMES & PASSWORDS

To gain access to the eGov Manager, you will need a username and password. Usernames are generally controlled by your organization's webmaster.

RESETTING USERNAMES & PASSWORDS

In the event that you do not remember either your username or your password to login to the eGov Manager – or you have recently been configured with access – go to the login screen and do the following:

1. Type your email address into the space provided at the bottom of the page. You will be forwarded to a new page.

2. If your email address was found in the system, you can request to have either your Username or your Password reset to the email address that you provided. You may need to fill out a CAPTCHA form in order to complete this request.

3. If your email address was not found, contact your organization's webmaster.

EGOV MANAGER FUNCTIONS

The eGov Manager enables staff members to update various types of content and interactive services. These include the following:

- **Staff Directory**
  Get quick access to your system's list of users for access to phone numbers, email addresses and more. This is a list of your staff members. It will not show system users who have the same access level as you, or your own information. ***YOU CANNOT EDIT ANY USER***

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INFORMATION FROM THIS LINK.

- **Structure**
  Create Department pages, topic & subtopic pages associated to one or more departments or division or board pages associated to a single department. Also create category and subcategory pages for "constituent-friendly" sections of your website.

- **Content**
  Manage documents, events, FAQs and services that can be associated to any of the structure pages. Also use specific tools like Agenda Builder, Map Builder, Business Directory, Properties Database and Image Gallery (for creating slide shows). Users with appropriate access can generate e-notifications and e-newsletters via the Document Center and Events Calendar.

- **Services**
  Manage online forms (Action Center), payments, and various registrations.

- **E-Billing**
  Manage online bill presentment options related to the Enterprise Payment Portal.

- **Social Media & Alerts**
  eGov Connect functionality enables users to manage email/SMS subscriptions and to generate Quick Message alerts.

- **Users**
  Manage users' access to the eGov Manager and update their appearance within the Staff Directory (e.g. update profiles, titles, contact information, current status and more).

- **Reports**

- **Assistance**
  Find access to quick reference guides, training videos and comprehensive help documentation.

ADDITIONAL NOTES

- Note that any changes made using the eGov Manager are *immediately available* on the website.
- Access is role-based, meaning that an eGov Manager user's access can be limited by content type (e.g. documents, events) and department.

EGOV MANAGER USERS & STAFF DIRECTORY

eGov Manager Users can update website content, manage interactive services for the website and add to the Staff Directory. An eGov Manager User may have access to one or more departments or simply have the capability to post to a specific division within the website (e.g. to the Planning Commission page).

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The Staff Directory enables an organization to build an online directory of their staff and structure. From the staff directory, visitors to your website can find phone numbers, email addresses and contact information for staff and important phone numbers for departments, divisions or sections of your organization. To get an individual to appear in the Staff Directory, they must be added as an eGov Manager user. For those individuals who do not need to be responsible for editing content, the user can be given "No Manager Access" as their level of access (see table below).

Staff Directory URL: <your domain>/eGov/apps/staff/directory.egov

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. Have a good understanding of how to configure users for access to the eGov Manager;
2. How to add users to the staff directory and ensure that they appear in the Staff Directory;

VIDEO: CREATING & MANAGING USERS

See Section 2 under "Video Tutorials" in the eGov Manager Help for a video on creating and managing users and adding them to the Staff Directory.

EGOV MANAGER ACCESS LEVELS

When adding a new eGov Manager user, you will need to select an access level. Options in descending order of access level and restrictions are shown below:

Level	Description	Set By	Number
Webmaster	Can modify all aspects of the system and view all records and services.	eGov Strategies	1 per Client
Project Manager	Can modify all aspects of the system, excluding the site look and feel. Can view all records and services.	Webmaster	2-3 per Client (core web team)
Administrator	Can modify aspects of the system directly involving content creation and management. Cannot modify "structural" elements such as departments-divisions. Has limited user administration privileges.	Webmaster & Project Mgr	Generally 1 per Department
Content Provider	Primarily limited to content management functionality within assigned department.	Webmaster, Project Mgr & Administrator	Unlimited
No Manager Access	Primarily used for individuals who should be in the Staff Directory but who do not need to make changes to website content.	Webmaster, Project Mgr, Administrator, & Content Provider	Unlimited

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MANAGING USERS

Within the eGov Manager's Users section (see the "Users" heading in the left-hand navigation of the eGov Manager), a user can perform the following functions:

- **My Account –** This is where a user can change their own account information, like username, email address, first name, last name, contact information and additional staff directory information;

- **My Password** – This is where a user can change their password or request that the system generate a new password. If the system generates a password, the user will need to change the password once they login;

- **Add** – Create a new eGov Manager User;

- **Modify** – Modify, delete or copy a User. Users can make eGov Manager Users active or inactive. The list of Users can be filtered by eGov Manager access level (e.g. Webmaster, Administrator) or by Department or Division.

- **Connections** – This is a placeholder for future functionality (example – being able to monitor users currently logged into the eGov Manager or track content editor history).

ADDING A NEW USER

The Add function enables the user to create a new eGov Manager User. Note that in most cases you will be configuring users to appear in the Staff Directory but NOT to have eGov Manager access. In those cases, be sure to set the "User Group" option to "No Manager Access" in the General tab.

When adding an eGov Manager User, the user will see the following tab options:

GENERAL TAB

- Provide User Group (level of access), email address, username, authentication method (usually eGov Manager) and password;

- First Name and Last Name, Title and preferred public email address. Note that an email address is always required but it does not necessarily have to be a working email address. Gender is required but not currently used within the system. *Please note: Non-working email addresses should only be used on those with 'No Manager Access' user level because the User will not be able to retrieve their Username or Password.*

  Many of these fields are used for two purposes: 1) to identify the user within the eGov Manager system; and 2) as entries for the individual in the public website's Staff Directory;

- In the case of Webmasters & Project Managers, you will not see any area for Classification. This area is required, however, for Administrators, Content Providers and No Manager Access levels. Select the appropriate Department and/or Division access levels.

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CONTACT TAB

- Associate one or more telephone numbers for a User. Note that telephone types can be customized for each client so have your project leader work with eGov in the event that new ones are appropriate for your website;

- Associate one or more addresses for a User. Note that you can either create a new address OR associate an address that is already in the Locations & Facilities Directory.

SUBSCRIPTIONS TAB

- This section enables you to view the email and SMS subscription lists to which this user has subscribed. You can also add a user to a specific subscription list;

E-BILLING TAB

- This section enables you to associate accounts from the E-Billing module to a specific user (e.g. associate utility billing account number 12345 to user John Doe).

STAFF DIRECTORY TAB

- Set the "Include in Staff Directory" option to indicate whether this user should appear in the public website's Staff Directory. If you want the user to be associated to a specific Department or Division, use the Departments/Divisions drop-down. By assigning Departments and Divisions from the drop-down you are including that User on the filtered Staff Directory from the Department or Division 'Contact Us' section on the citizen side.

  To ensure that the individual appears in the Staff Directory, you must designate the "Show to Public" field when adding a Department or Division. The primary indicator ensures that this individual's Department/Division designation appears first in the list on their Staff Profile and the primary department will be included as their Department on the Staff Directory landing page.

- See the "Staff Directory Fields" section below for more specifics on the fields within this section.

MODIFYING USER & STAFF DIRECTORY ENTRIES

MODIFYING YOUR OWN PERSONAL USER & STAFF DIRECTORY ENTRY

Select the "My Account" option under Users in the left-hand navigation to change your own Staff Directory details. Note that when viewing a list of Users, you will not see your own entry listed.

MODIFYING & DELETING USERS & STAFF DIRECTORY ENTRIES

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Use the “Modify” option under Users in the left-hand navigation in order to modify a User added to the eGov Manager. Note that the user must be associated to a Department to which you have access in order to update their information.

- Click on the “Mod” button in order to edit the User’s information.
- Click on the “Del” button will permanently remove the entry from the system.
- Click the “Active” button to make the user “inactive”. The user will no longer appear in the Staff Directory and will no longer be able to access the eGov Manager if they were a Content Provider or higher.

Note that a good practice for Council & Commission members and Department Heads is to **REPLACE** new individuals with the new individual’s information. Thus, you would update their email address, name, etc. in the General Tab. That way, you can retain all associations for the individual (like how the Council member was linked in via the Council page).

EGOV MANAGER USER FIELDS

User fields related to eGov Manager Users are generally all listed within the General tab. Users with “Webmaster” and “Project Manager’” access can edit information for all users of the system. Users with lower level access are limited to content and services associated to those specific departments.

- Username, email address and password;
- User type – typically this will be “staff”;
- Access level – see the table “eGov Manager Access Levels”;

Depending upon the Access Level chosen, the following fields can be selected:

- Department access – choose all that apply
  If access level is “Administrator”, access will be at a Department level. If access level is “Content Provider”, access is at department or division level.
- Application access – choose all that apply.

If the user does not need to appear in the Staff Directory, choose that option in the Staff Directory tab.

STAFF DIRECTORY FIELDS

The following outlines the various Staff Directory fields that can be configured for a user’s representation within the Staff Directory:

FIELDS SET IN THE GENERAL TAB

- First Name and Last Name
- Title
- Preferred Email Address

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FIELDS SET IN THE CONTACTS TAB

- One or more telephone numbers
- One or more addresses

FIELDS SET IN THE STAFF DIRECTORY TAB

- Department and/or Division designations

- **Image** – An image can be associated to a user using the "Attach Image" option. To select a file, click "Browse…" and navigate to the file on the local PC. Once the file has been located, click "continue." To remove the image, click “Cancel”. To ensure the image is not distorted, it should be resized to 100 x 125 px prior to being uploaded.

- **Professional Profile** – Information such as years in the field or completed initiatives can be entered into the Professional Profile text box. Text can be edited in the same manner as a word processor or pasted in from another source.

- **Biographical Sketch** – The Biographical Sketch field can contain information similar to the Professional Profile field but is used when the user wants to upload a file (e.g. a PDF document) rather than provide text. To select a file, click "Browse…" and navigate to the file on the local PC, or drag-and-drop the file into the box. Once the file has been located, click "continue." ." To remove the file, click “Cancel”.

- **Status Message –** A contact message can be used similar to an outgoing voice mail message that indicates that you are in or out of the office. Note that you can use activation options to set the status to appear and disappear on specific dates.

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FRONT-END EDIT FUNCTIONALITY

Websites developed by eGov Manager are configured with Front-End Edit functionality. Front-end edit enables individuals logged into the eGov Manager to navigate the website and see what areas of their website can be updated with just the click of a button.

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. Use Quick Edit to help you identify how you update a specific item or add a new item to a section within a web page;
2. Use Quick Edit pencil to make changes in-line without using the eGov Manager;

VIDEO: USING FRONT-END EDIT

This video provides an overview of using Quick Edit functionality and the Quick Edit pencil.

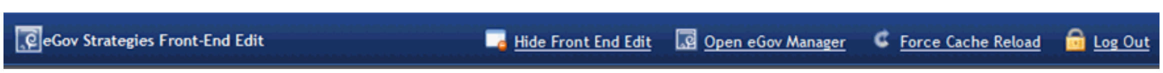
ACTIVATING FRONT-END EDIT

Front-End Edit is advanced functionality integrated into your website that is shown only to individuals who are currently logged into the eGov Manager.

To use Front-End Edit functionality, we recommend the following:

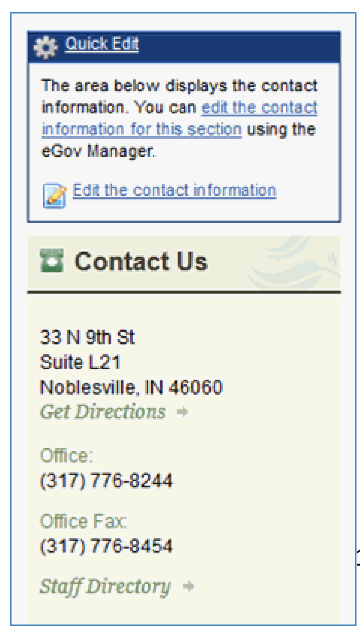
- **Log-in to the eGov Manager as normal (e.g. your website and /manager)**
- **From this browser window, open a second tab and navigate to your website.**

If you have successfully logged in, you should now see a Front-End Edit toolbar at the top of any web page of the site managed via eGov Manager. The toolbar looks like this:



HOW FRONT-END EDIT WORKS

QUICK EDIT LINKS FOR CONTENT ITEMS & CONTACT US INFORMATION



If you see the blue bar at the top, you will now see blue bars over various content areas (e.g., list of news & notices, list of Services, contact information, etc.). These blue bars will say "Quick Edit" and will be preceded by an icon that looks like a " 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.

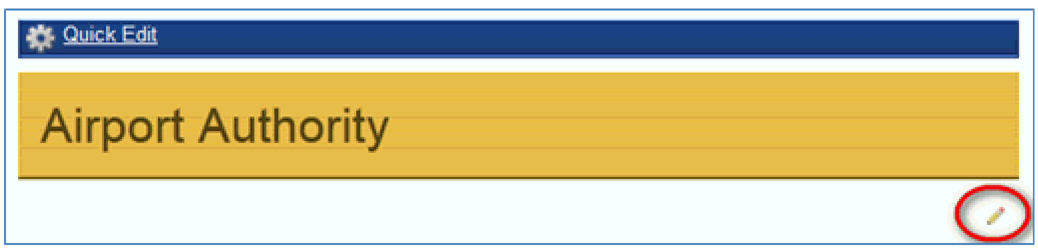
Note that if – after making your edits - you want to see what the page looks like without Front End Edit, refresh the page and then use the "Hide Front End Edit" link in the Front End Edit bar to toggle Front End Edit on and off.

QUICK EDIT PENCIL FOR EDITING STRUCTURE DESCRIPTIONS

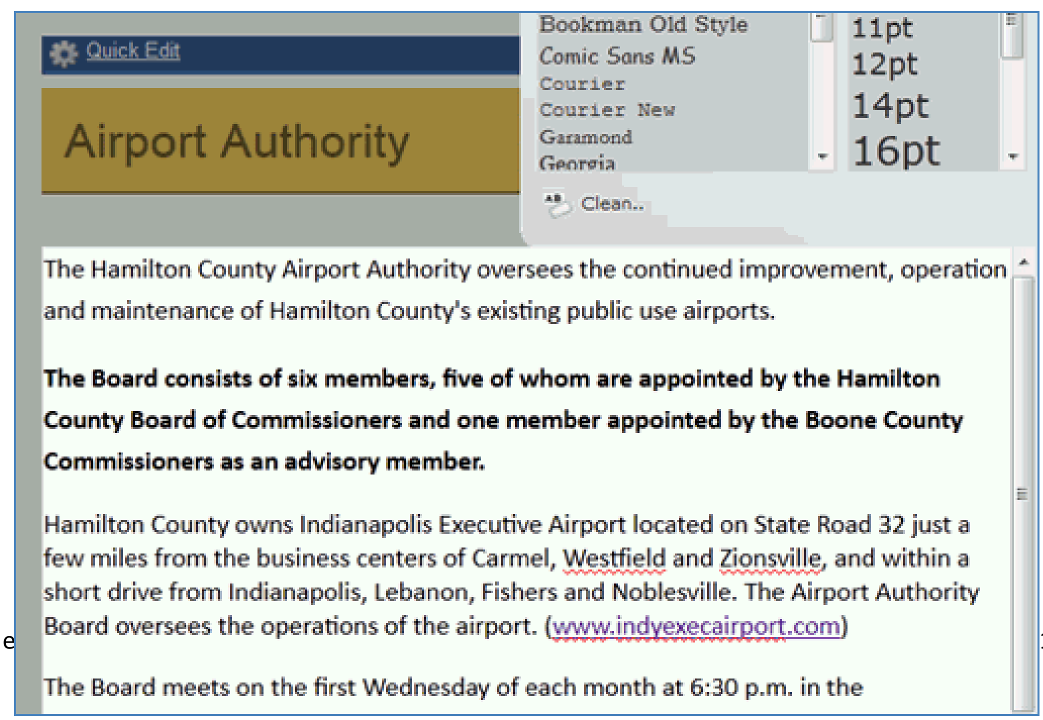
While Front-End Edit jumps you into the appropriate place within the eGov Manager, Quick Edit enables the user to make changes to the website "in-line" via a pop-up window (this is actually called a 'modal dialogue' and is a special version of pop-up window that does not able you to view or edit any other content in your PC).

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 (Structure items only: e.g. Department descriptions, Division descriptions, Topic descriptions, Subtopic descriptions, etc.), users can make changes without returning to the eGov Manager interface. Follow these four steps once you are logged into the eGov Manager:

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. Note that you may need to move the Text Editing Box (see Figure 1.4.5 below) in order to get to the content area;



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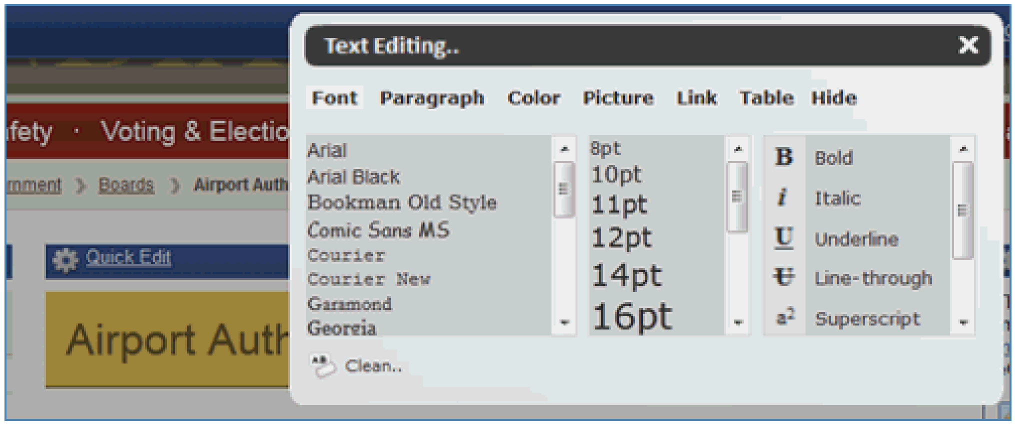
3. In the grey pop-up box, modify font types, colors, styles, add lists, photos and links; and



4. Hit the X in the upper right-hand corner of the pop-up box (Figure 1.4.5) to save your changes. You will be prompted to confirm your changes.

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CUTTING-AND-PASTING CONTENT

The HTML Editor provides several icons for cutting and pasting content into the website and cleaning up the resulting content.

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. Understand how to use the HTML Editor to cut-and-paste content from an MS Word document or web page;

VIDEO: ADDING CONTENT USING CUT-AND-PASTE

See Section 4 under "Video Tutorials" in the eGov Manager Help for a video providing tips for cutting and pasting content into your website.

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MANAGING DESIGN ELEMENTS

Websites developed by eGov Strategies can be configured with dynamic header images that rotate through a series of photos. In most cases, your eGov Manager will be configured to enable you to select which photos rotate.

MANAGING DYNAMIC PHOTOS FOR THE HOME PAGE

The Image Gallery enables users of the eGov Manager to add photos to their website. We extend the use of the Image Gallery to also be the official directory for the rotating images displayed on the home page. Simply upload your photo to the directory below using the "Modify" link under Image Gallery from the eGov Manager home page:

Homepage Images DO NOT EDIT

If you do not upload your image as the same size of your current home page photo, realize that your image will likely be distorted when displayed.

If we have provided you a PAINT.NET template, follow these instructions to ensure that your photo has the appropriate borders:

1. Open your Home Page Template;
2. Select the Layer for 'Insert Photo Here';
3. Open your photo in Paint.Net (this will open a new window);
4. Select the portion of your photo to go into your template and close this window;
5. Paste the saved image into the current layer.

Save your photo as a .jpg formatted file and upload it into the Image Gallery.

MANAGING CUSTOM HEADERS FOR DEPARTMENTS

Header images for Departments are not managed in the Image Gallery but instead are managed via the Logo field within a Department. The size of these images are likely custom for your website. If you have questions regarding the appropriate size, check with your site's Webmaster.

1. Choose Manage My Department;

Modify Your Department; Upload Header to the 'Logo' field using 'Select'.

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USING THE INTRANET

THIS SECTION IS NOT YET COMPLETE.

Often used for internal staff communication, the Intranet is designed for private correspondence access for boards, commissions, employees, volunteers and staff. Only authorized viewers may access the Intranet.

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STRUCTURE

The following section will feature information managed within the **Structure section** of the eGov Manager. Key sections include:

- Departments
- Topics & Divisions
- Categories
- Locations & Facilities

DEPARTMENTS (STRUCTURE)

Structure pages created and managed within the eGov Manager are used to provide an organizational framework for your website. In most websites, the structure will consist of the following:

- **Organization Home Page**
  This is a **Department** that is specifically configured to control content for your organization's home page.

- **Departments**
  Additional **Departments** are created to represent entities within the organization. For example in the case of a City, a Department would be created for each City Department like Mayor's Office, Public Works, Parks & Recreation, etc. You can expand upon a Department page by creating either Divisions or Topics "underneath" a Department.

- **Categories**
  Categories are created to represent "constituent-friendly" items that could represent content that exists across multiple Departments. Examples of categories commonly created for city and county websites include: Residents, Business and Taxes.

Departments URL: <your domain>/departments/

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. Have a good understanding of what information can be managed under the "Structure" tab of the eGov Manager;
2. Be able to update the home page description for Departments, Divisions or Topics; and
3. Be able to understand when to add a Division and when to add a Topic for your Department;

VIDEO: MANAGING DEPARTMENT VIDEOS

See Section 2 under "Video Tutorials" for a variety of videos related to managing content for a Department. Topics include Creating Your Department's Web Presence and Using Divisions & Topics.

See the "Updating a Department Home Page" section of the Basic Website User Guide to get a quick, comprehensive tutorial on how to update key elements of your Department's home page.

DEPARTMENTS IN AN EGOV WEBSITE

A Department represents a major entity of government (i.e. Mayor's Office, County Council, Parks Department, Public Works Department, etc.). A Department can have "associated" information with it that could include any of the following:

- Name
- Descriptions (e.g. short description, full description, Intranet description)
- Contact Information (phone & fax numbers)
- Addresses
- Staff & Users
- Divisions
- Topics & Subtopics

DEPARTMENT FUNCTIONS

Within the eGov Departments application (under Structure), a user can perform the following functions:

- **Add** - add a new department. Generally created by Webmasters;

- **Modify** - Modify an existing department. By selecting Modify, a user can see which departments he/she can update. These will be the same Departments to which he/she can associate content;

- **Reorder –** Reorders how Departments are listed on the /departments page.

- **Configure –** Create department classifications (or types) – e.g. Departments, Elected Officials.

MODIFYING A DEPARTMENT

The Add and Modify functions enable users to edit various fields for a Department. When modifying a Department, the user will see the following tabs:

GENERAL TAB

- Edit the name of the Department, Department Head, office hours and official logo
- If this Department uses a special template or has an existing website that should be used as its home page, complete the URL field. The Custom URL field is a redirect and does not create a shortened URL for the Department landing page.
- Add the Department Head by typing in the name of an eGov Manager user and pause until a list of matching users is found. Then, select the appropriate user from the list.
- You can associate multiple phone numbers & addresses to this Department.

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  - For addresses, if you have added Locations to your Locations & Facilities Directory, you will have the ability to associate a Location as the address – thus eliminating any possible double-entry.
  - For phone numbers, the Primary phone number will appear first. Keep in mind that the phone types can be customized; work with eGov if you need to have one added.

DESCRIPTION TAB

- The Full Description appears prominently on the Department home page. The Short Description is sometimes used on the list of Departments page – usually at /departments/.

DIVISIONS TAB

- Use the Add link to create new divisions or the mod/del/copy buttons to edit/delete/copy an existing Division. In either case, the page will open with a new tab formation – the formation used for Divisions. Once you've completed your work, the user will be returned to the Modify Department General tab.

STAFF DIRECTORY TAB

- You can associate users to be included within this Department's staff directory. Note that this is the same setting that you'll find in the Modify Users / Staff Directory tab.

USER ACCESS TAB

- You can associate users to have the ability to edit this Department. Note that this is the same setting that you'll find in the Modify Users / General tab's Access Permission's section.

DIVISIONS & TOPICS

Divisions & Topics represent logical sections of a Department.

WHEN TO USE A DIVISION

Divisions are generally used for content that represents the governmental nature of a Department - like a Division or a Board/Commission (e.g. Street Division, Patrol Division, Planning Commission).

For Boards and Commissions, the website will generally utilize a special template that features areas for meeting dates, meeting agendas and meeting minutes. Additionally, the website will also generally feature a special "Boards & Commissions page" (at /boards/) that has a dynamic list of all boards & commissions configured within the website.

WHEN TO USE A TOPIC

Topics represent information that is closely associated with the Department. There are two main differences between topics and divisions:

1. Divisions are associated with one and only one Department. A Topic can be associated to multiple departments;

2. A Topic can have additional sections underneath it in the form of Subtopics. Thus, the Public Works Department could have a Topic for Recycling that could include Subtopics for Recycling Pickup Schedule, Recycling Policies and Recycling Sites.

   Subtopics are generally implemented within the website design as “fly-out” navigation within a list of Related Topics from the Department page.

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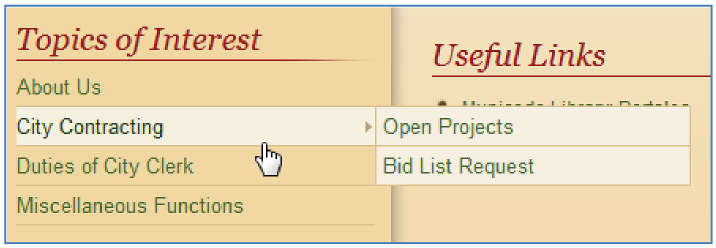
TOPICS & DIVISIONS (STRUCTURE)

The goal of most website editors is to ensure that pages of content are short and concise. One method for ensuring this is the case is to organize information within a Department in subsections. There are two resources available within the eGov Manager for this purpose:

- **Topics –** can be associated to multiple Departments. Subtopics can be created for a Topic and are generally implemented as “fly-out” navigation within a list of Related Topics.



- **Divisions –** associated with one and only one Department. A Board/Commission is a special type of Division that is usually configured with “Content Windows” for Events, Agendas & Minutes. The Boards URL is: <your domain>/boards/.

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. How to add Topics and Divisions to a Department website;
2. Be able to understand the difference between when to use Divisions and when to use Topics;

VIDEO: USING TOPICS & DIVISIONS

See Section 2 under “Video Tutorials” in the eGov Manager Help for a variety of videos related to managing content for a Department. Topics include Creating Your Department’s Web Presence and Using Topics & Divisions.

GUIDE – EGOV V6 BASIC WEBSITE USER GUIDE (TOPICS & SUBTOPICS)

See the “Updating a Department Home Page” section of the Basic Website User Guide to get a quick, comprehensive tutorial on how to update key elements of your Department’s home page.

DIVISION AND TOPIC FUNCTIONS

Within the eGov Manager’s Structure section, a user can perform the following functions on both Topics & Divisions:

- **Add** – Create a new division or topic;

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- **Modify** – Modify, delete or copy an existing division or topic. Users can also make divisions and topics inactive. The list of divisions and topics can both be filtered by type and Department;

- **Reorder** – Divisions and topics can be reordered. For Divisions, this affects the order that they appear within the department-level navigation.

  Because Topics can belong to multiple Departments, topics may be ordered in alphabetical order.

ADDING A DIVISION OR TOPIC

The Add function enables the user to create a new Division or Topic. When adding an entry, the user will see the following tab options:

GENERAL TAB

- Edit the name of the Division or Topic, associate a "head" for the division or topic, add office hours and an official logo.
- If this Division or Topic uses a special template or has an existing website that should be used as its home page, complete the URL field.
- You can associate multiple phone numbers & addresses to this Topic or Division.
  - For addresses, if you have added Locations to your Locations & Facilities Directory, you will have the ability to associate a Location as the address – thus eliminating any possible double-entry.
  - For phone numbers, the Primary phone number will appear first. Keep in mind that the phone types can be customized; work with eGov if you need to have one added.

DESCRIPTION TAB

- The Full Description appears prominently on the Division or Topic home page. The Short Description for Divisions is sometimes used on the list of Boards page – usually at /boards/.

SUBTOPICS TAB (for Topics only)

- Use the Add link to create new topics or the mod/del/copy buttons to edit/delete/copy an existing Topic. In either case, the page will open with a new tab formation – the same formation that is used for Topics and Divisions. Once you've completed your work, the user will be returned to the Modify Topic General tab.

DEPARTMENT ACCESS TAB (for Topics only)

- Use the "Edit List" function to associate this Topic to a Department or Division. Every Department and Division that is selected will ensure the Topic shows up in the navigation on those pages.

STAFF DIRECTORY TAB (for Divisions only)

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- You can associate users to be included within this Division's staff directory. Note that this is the same setting that you'll find in the Modify Users / Staff Directory tab.

USER ACCESS TAB (for Divisions only)

You can associate users to have the ability to edit this Division. Note that this is the same setting that you'll find in the Modify Users / General tab's Access Permission's section. When adding a Division or Topic, by default, all users underneath you will have access to the new Division or Topic. Make sure you complete this tab, if a limited number of your staff should have access.

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CATEGORIES & SUBCATEGORIES (STRUCTURE)

A Category represents a major non-governmental section within a government website (e.g. Residents, Business and Visitors) that is used to direct constituents to information within the website. Generally, categories enable constituents to access information and services without knowing the real structure of government. A Category can have "associated" information with it that could include any of the following:

- Name
- Descriptions (e.g. short description, full description, Intranet description)
- Subcategories

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

- Understand how to create and deploy "constituent-focused" sections for your website.

CATEGORY FUNCTIONS

Within the eGov Departments application (under Structure), a user can perform the following functions:

- **Add** - add a new category. Generally created by Webmasters;

- **Modify** - Modify an existing category. By selecting Modify, a user can see which categories he/she can update. These will be the same Categories to which he/she can associate content;

- **Reorder –** Reorders how Categories are listed on the page.

- **Configure –** Create category classifications (or types).

MODIFYING A CATEGORY

The Add and Modify functions enable users to edit various fields for a Category. When modifying a Category, the user will see the following tabs:

GENERAL TAB

- Edit the name of the Category
- If this Category uses a special template or has an existing website that should be used as its home page, complete the URL field. The Custom URL field is a redirect and does not create a shortened URL for the Category landing page.

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- Note that there is no contact information that can be associated to a Category.

DESCRIPTION TAB

- The Full Description appears prominently on the Category home page.

SUBCATEGORIES TAB

- Use the Add link to create new subcategories or the mod/del/copy buttons to edit/delete/copy an existing Subcategory. In either case, the page will open with a new tab formation – the formation used for Subcategories. Once you've completed your work, the user will be returned to the Modify Category General tab.

DEPARTMENT ACCESS TAB

- You can associate departments that have the ability to associate content to this Category.

SUBCATEGORIES

A subcategory represents a logical sections of a Department. The tabs are identical to the tabs used for a Category.

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LOCATIONS & FACILITIES (STRUCTURE)

The Locations & Facilities Directory enables website users to find out about locations and facilities that are managed and operated by local governments. Typically, Parks Departments will use this module to provide easy access to parks and the amenities and facilities within their parks.

Locations & Facilities URL: <your domain>/eGov/apps/locations/facilities.egov

DEFINITION OF TERMS

- A "**Location**" is generally a major park, a city landmark (e.g. a museum) or a government office location.
- A "**Location Type**" is a way of grouping similar types of locations. For example, you may want to create a "Location Type" for each of the following: major parks, athletic fields and/or government offices.
- A "**Facility**" is generally an item located within a "Location" that either 1) can be reserved; or 2) should be featured or described in more detail. A facility could be a softball field, a swimming pool or a recreation center located within a major park. Note that to reserve an item through our system, it must be a facility.
- A "**Facility Type**" is a way of grouping similar types of facilities. For example, you may want to create a "Facility Type" for each of the following: rec centers, athletic fields, swimming pools and picnic shelters.
- An "**Amenity**" is a small convenience that is located within a location or a facility. Amenities are general in nature and include items such as playground equipment, parking areas, restrooms, courts, trails, etc.

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to add locations & facilities;
- To be able to configure facilities for registration;

LOCATIONS & FACILITIES FUNCTIONS

Within the eGov Manager's Locations and Facilities tabs, an eGov Manager User can perform the following functions:

- **Add** – Create a new location or facility. Note that locations & facilities can be associated to Departments, Divisions, Topics, Subtopics, Categories & Subcategories.
- **Modify** – Modify, delete or copy an existing location or facility. Users can also make locations or facilities active or inactive. The lists can be filtered by active status and featured. Generally, featured items are the only locations displayed on the Locations landing page (see the Locations & Facilities URL above).

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- **Reorder** – A Webmaster or Project Manager has the additional ability to order a list of locations and a list of facilities.

- **Configure –** A Webmaster or Project Manager can add location types and facility types and configure amenities that are associated to the Locations & Facilities.

ADDING A LOCATION OR FACILITY

The Add function enables the user to create a new location or facility entry. When adding a location or facility, the user will see the following tab options:

GENERAL TAB

- Provide General Information (e.g. location name), select a location or facility type, status, featured and indicate whether it should appear in the public listing (Use for Public Filters).

- Add a single address and multiple phone numbers if desired.

- Choose Classification (to Departments, Divisions, Topics, Subtopics, Categories and Subcategories).

- Select any number of amenities that this Location or Facility has.

ACCESS TAB

- Configure the location or facility's activation or expiration dates.

DESCRIPTION TAB

- The Description will appear on the Location or Facility home page.

FACILITIES TAB (Locations Only)

- The Facilities tab enables the user to add facilities to this Location.

MODIFYING & DELETING LOCATIONS & FACILITIES

Use the "Modify/Delete" function from the Locations or Facilities navigation menu to modify a location or facility.

BROWSING LOCATIONS OR FACILITIES

- Clicking on the "Mod" button will allow the User to modify a Location or Facility in the same manner in which it was created.

- Clicking the "Del" button will permanently remove the location or facility from the system.

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- Clicking the “Active” button has a “toggle” effect – making the Location or Facility “Inactive”. Clicking the “Inactive” text will return the Location or Facility back to “Active” state. If you are trying to find a Location or Facility that has been inactivated, you may need to adjust the Search criteria at the top of the page to ‘Include Inactive’.

FINDING YOUR LOCATION OR FACILITY

By default the Locations & Facilities are sorted in order of their date of posting. Clicking on the column headers will re-sort the list according to the information contained in that column.

If your Location or Facility is not readily found in the list of documents, use the search box (see image above) at the top of the Modify screen to limit the browsed documents. You can limit the locations or facilities displayed as follows:

- Provide keywords in the search box that could match words or phrases in the document title, description or keyword fields;

Once the criteria have been entered, click the “check mark” to start the search.

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CONTENT

The following section will feature information managed within the **Content Section** of the eGov Manager. Key sections include:

- Agenda Builder
- Blog
- Business Directory
- Document Center
- Events Calendar
- Frequently-Asked Questions
- Image Gallery & Slide Show
- Map Builder
- Mobile Apps
- Properties Database
- Services Directory
- Snippets

AGENDA BUILDER (CONTENT)

The Agenda Builder enables clients to "go paperless" with an easy-to-use alternative to cumbersome paper-driven agenda processes. Quickly prepare meeting agendas, complete with attached reports, maps, drawing, supporting documentation. Even collect constituent input before the meeting.

LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. Understand where you can go to get application-specific help for using the Agenda Builder.

GUIDE – EGOV V6 USING THE AGENDA BUILDER

See the "Using the Agenda Builder" User Guide to get a comprehensive tutorial on how to create and modify agenda items within your website.

Refer to the ***eGov Manager Help*** section within the ***Assistance*** tab. Locate the **Agenda Builder** user guide under *User Guide* **>** *Quick Reference Guides* for quick, comprehensive tutorial on creating agendas to enhance your website.

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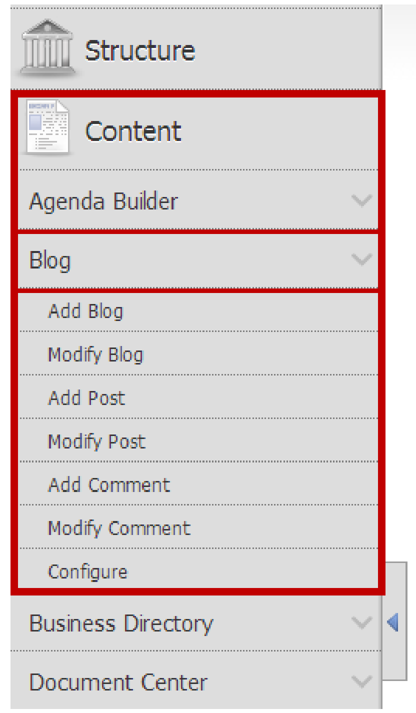
BLOG (CONTENT)

Promote an active dialog with citizens via Blog. Restrict communication to one-way, or invite public comments with access controlled by two-way settings.

You can find the Blog within the v6 Manager under the Content Tab:



LEARNING OBJECTIVES & RELATED RESOURCES

From this section of our Training Manual you should:

1. Become proficient in managing your website's Blog (modifying blog content, adding comments, posting replies, etc).

ADDING & MODIFYING WEBSITE BLOG(S)

The Add function enables the user to create a Blog for their website. The Modify function allow the user to alter any of the previously entered Blog information or access permissions. When adding a Blog, the user will see the following tab options:

GENERAL TAB

- Provide a name for the entry and an image, if desired.
- For Classification, generally, you can just select the Home Page department as Department, Division & Topic classification is not generally used within most websites.

ACCESS TAB

- Configure the Blog's activation or expiration dates (when it should appear or disappear from the public side).
- Complete the "Posting Rights" section accurately to ensure only the necessary people have access to post in the Blog.

DESCRIPTION TAB

- Provide a (Full) Description of intent that will appear when constituents or staff view the Blog.

TIP: ADD A DISCLAIMER FOR (THIRD-PARTY) BLOG USERS

To more effectively manage the content quality of third-party users, we suggest you issue a disclaimer notice detailing specific rules/guidelines by which they must abide by when contributing to your website's blog (see sample below). Consider adding this disclaimer on a separate page, and have it apply to all social media applications hosted by your website.

In accordance with the City's Social Networking Policy, any comment, response, etc. containing the following content is prohibited on the City's Social Media sites:

1. *Comments not topically related to the particular subject being discussed;*
2. *Comments in support of or in opposition to political campaigns or ballot measures;*
3. *Profane language or content; Content that promotes, fosters, or perpetuates discrimination on the basis of race, creed, color, age, religion, gender, marital status, national origin, status with regard to public assistance, physical or mental disability, or sexual orientation;*
4. *Defamation of character against a City employee, official or residents;*
5. *Sexual content or links to sexual content; Solicitations of commerce or advertisements;*
6. *Illegal content or encouragement of illegal activities;*
7. *Information that may tend to compromise safety or security of the public or public systems;*
8. *Accusations or implications that a particular individual is guilty of any criminal conduct or immoral activity. Defamatory material will not be permitted. If a person believes that there is a legitimate basis to make a complaint against the City, any of its employees or any third party, then appropriate alternative means of registering the complaint must be utilized. City social media sites are not appropriate forums for registering allegations of criminal activity or other accusations against individuals;*
9. *Content containing personally identifiable information such as Social Security Numbers or City employee personal email addresses;*
10. *Content that violates a legal ownership interest of any other party;*
11. *Content that violates federal, state or local law.*

Please note that the content posted by non-City users of this site do not reflect the opinions and positions of the City or its employees.

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From this section of our Training Manual you should:

ADDING & MODIFYING BLOG POSTS

From this section of our Training Manual you should:

ADDING & MODIFYING COMMENTS

BUSINESS DIRECTORY (CONTENT)

The Business Directory enables towns, cities and economic development administrators to publish a comprehensive and index-able directory of businesses and organizations within their community. Entries can be classified by types customized by the client – thus enabling the Business Directory to serve various purposes – from promoting businesses to serving as a Visitors Index to serving as a database of community organizations.

Business Directory URL: <your domain>/eGov/apps/business/directory.egov

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to add items to the Business Directory;

BUSINESS DIRECTORY FUNCTIONS

Within the eGov Manager's Business Directory, a user can perform the following functions:

- **Add** – Create an entry.

- **Modify** – Modify, delete or copy an entry for the directory. Users can also make entries active or inactive. The entries can be filtered by property type or active status.

- **Configure** – A Webmaster or Project Manager has the additional ability to create business types within the Business Directory. Note that some clients use this capability to expand the Business Directory to be more of a Community Organization directory – just by adding non-profit types of "business types".

ADDING AN ENTRY

The Add function enables the user to create a new entry for the Business Directory. When adding an entry, the user will see the following tab options:

GENERAL TAB

- Provide a name for the entry and an image, if desired.

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- For Classification, generally, you can just select the Home Page department as Department, Division & Topic classification is not generally used within most websites.

ACCESS TAB

- Configure the entry's activation or expiration dates (when it should appear or disappear from the Directory).

DESCRIPTION TAB

- Provide both a business "purpose" and a description for the entry that will appear when someone selects the entry from the Directory.

SOCIAL MEDIA & ALERTS TAB

- If you want to maintain a list of individuals who get updates regarding new entries added to the Directory, create a subscription list (see "Social Media & Alerts" section) and generate a notification to the appropriate list from this tab.

MODIFYING & DELETING ENTRIES

Use the "Modify/Delete" link from the Business Directory navigation menu to modify an entry previously added through the eGov Manager or to remove an entry from the Directory.

BROWSING ENTRIES

- Clicking on the "Mod" button will allow the User to modify an entry in the same manner in which it was created.

- Clicking the "Del" button will permanently remove the entry from the system.

- Clicking the "Active" button has a "toggle" effect – making the entry "Inactive". Clicking the "Inactive" text will return the entry back to "Active'" state.

FINDING YOUR ENTRY

By default the entries are listed by the order of their date of posting. Clicking on the column headers will re-sort the list according to the information contained in that column.

If your entry is not readily found in the list, use the search box (see image above) at the top of the Modify screen to limit the browsed entries. Provide keywords in the search box that could match words or phrases in the entry name.

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DOCUMENT CENTER (CONTENT)

The Document Center enables staff members to create and manage documents for the website so that they are available to constituents. In addition to posting news and notices, the eGov Manager can be used to post PDF forms, meeting agendas & minutes, project reports, breaking news and job postings.

When a document is added to the website, it will show up in the following locations:

- Department and/or Division page(s);
- Topic or Subtopic pages;
- Category page(s); and in the
- Document Center.

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to add documents to your website by creating HTML web pages, by uploading documents such as PDF forms or by creating a link to a location already on the Internet;

GUIDE – EGOV V6 BASIC WEBSITE USER GUIDE (USING NEWS & EVENTS - DOCUMENTS)

See the "Using News & Events" section of the Basic Website User Guide to get a quick, comprehensive tutorial on adding documents to your website.

DOCUMENT CENTER FUNCTIONS

Within the eGov Manager's Document Center, an eGov Manager User can perform the following functions:

- **Add** – Create a new document and add it to the appropriate section of the website. The document can be created in one of 4 primary ways:
    - *Choose "Create" in the General tab and create a new web page* – complete the "Description" field within the HTML tab for the body of your document;
    - *Choose "Create" in the General tab and create a new web page that lists 1 or more associated documents at the end* – complete the "Description" field within the HTML tab and upload Associated Documents via the Documents tab;
    - *Choose "Upload" in the General tab and create a document that can be downloaded* – complete the Documents tab by uploading the downloadable form or document; and
    - *Choose "Link" in the General tab and create a document that jumps to a website URL* – simply add the destination URL within the General tab.

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- **Modify** – Modify, delete or copy an existing document. Users can also make documents active or inactive. The list of documents can be filtered by document type, active status, featured, expired (configured with the option to appear or disappear from the website at specific times) and show associated documents.

- **Configure** – A Webmaster or Project Manager has the additional ability to create unique document types (e.g. news & notice, breaking news, job postings, etc.).

- **Batch Upload –** A user can upload documents in batch mode as long as documents have been FTP'd the appropriate location.

Document Center URL: <your domain>/eGov/apps/document/center.egov

ADDING A DOCUMENT

The Add function enables the user to create a new web page by either using a WYSIWYG (What You See Is What You Get) editor, cutting-and-pasting into the WYSIWYG editor, uploading a file or linking to an existing website or web document.

When adding a document, the user will see the following tab options:

GENERAL TAB

- Provide General Information (e.g. document title) and most importantly, decide whether you are creating an HTML document (may include associated documents), uploading a single file or linking to an existing web location (URL).

- Choose Classification (to Departments, Divisions, Topics, Subtopics, Categories and Subcategories). For each classification box you check, it corresponds to a page on the citizen side where a link to your document will appear.

- Choose Document Type (this is a required field). Document Types determine where on the citizen side the document will appear. Certain document types are setup as feeds where the document title will be displayed prominently (e.g. news, related pages). Other document types will just create a link within the More Information section of the page (e.g. forms/applications, ordinances).

ABOUT TAB

- Provide a Short Description for the document - often used within News & Notices sections.

ACCESS TAB

- Configure the document's activation or expiration dates or designate whether this document should appear in the Intranet.

HTML TAB

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- REQUIRED if you choose "Create". Use the WYSIWYG (What You See Is What You Get) editor to create a document. This editor can be used in much the same fashion as Microsoft Word. Document content can be pasted into the box from other editors. See Appendix 1 for an explanation of button functions.

DOCUMENTS TAB

- REQUIRED if you choose "Upload" in the General tab. If your news item or meeting minutes need to refer to additional documents, choose "Create" in the General tab and proceed to upload multiple associated documents (e.g. Chapters in a plan).

DETAILS TAB

- Provide additional details about the document, like pages.

SOCIAL MEDIA & ALERTS TAB

- Once you have completed the document, use this tab to use the "1-Click Publishing" feature to send a notification or an e-newsletter using this document. Alerts can be sent to a subscription list of emails or to social media websites like Facebook & Twitter.

MODIFYING & DELETING DOCUMENTS

Use the "Modify/Delete" link from the Document Center navigation menu to modify a document previously added through the eGov Manager or to remove a document from the website.

BROWSING DOCUMENTS

- Clicking on the "Mod" button will allow the User to modify a document in the same manner in which it was created.

- Clicking the "Del" button will permanently remove the document from the system.

- Clicking the "Active" button has a "toggle" effect – making the document "Inactive". Clicking the "Inactive" text will return the document back to "Active'" state.

FINDING YOUR DOCUMENT

By default the documents are sorted in order of their date of posting. Clicking on the column headers will re-sort the list according to the information contained in that column.

If your document is not readily found in the list of documents, use the search box (see image above) at the top of the Modify screen to limit the browsed documents. You can limit the documents displayed as follows:

- Provide keywords in the search box that could match words or phrases in the document title, description or keyword fields;

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- Limit the document types to display (e.g. show all news & notices) by selecting the drop-down; or
- Webmasters may want to filter by a specific Department or Division.

Once the criteria have been entered, click the “check mark” to start the search.

DOCUMENTS & SERVICES

Pages can be added through the eGov Manager as documents or services. If you are looking for a document in the Document Center and do not find it, try the Services Index.

MANAGING STREAMING MEDIA

If you have purchased Streaming Media functionality, you can upload streaming media documents via an FTP connection specifically created for this purpose.

Once you FTP your Windows Media Player-compatible file to the FTP location, select the Streaming Media link from within the Document Center.

Complete the following sections as you would for any other type of document:

- General Information
- Classification

Under classification, you will likely want to select a “Streaming Media” document type. If that document type is not configured, see the “For Advanced Users” topics on how to create a document type.

SELECT FILE TO STREAM

In this section, simply highlight a streaming media document and hit the left-cursor of your mouse to select a file to stream. This media document will then be added to the Document Center and associated content windows based on the document type selected above.

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EVENTS CALENDAR (CONTENT)

The Events Calendar enables staff members to create and manage regular and special events for the website.

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to add events to your website;
- To be able to add recurring events to your website and be able to modify the series or a specific event created using the recurring event feature;

GUIDE – EGOV V6 BASIC WEBSITE USER GUIDE (USING NEWS & EVENTS - EVENTS)

See the “Using News & Events” section of the Basic Website User Guide to get a quick, comprehensive tutorial on adding events to your website.

EVENTS CALENDAR FUNCTIONS

Within the eGov Manager’s Events Calendar, a user can perform the following functions:

- **Add** – Create a new calendar entry or a set of recurring calendar entries according to a recurrence pattern (e.g. every 2nd Monday of every month).

- **Modify** – Modify, delete or copy an existing calendar entry. Users can also make events active or inactive. The list of events can be filtered by event type, event start date or end date or active status. Note that recurring items are automatically created as individual events within this view.

- **Configure** – A Webmaster or Project Manager has the additional ability to create unique document types (e.g. news & notice, breaking news, job postings, etc.).

Events Calendar URL: <your domain>/eGov/apps/events/calendar.egov

ADDING AN EVENT

The following fields should be completed when adding or modifying an Event.

GENERAL TAB

- **Title** – Enter a unique event name to be displayed to users.

- **Status –** Indicate the event’s status as “Active” or “Inactive”. Active items will be available to constituents while inactive items will not.

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- **URL** – This is a hyperlink to another internal or external page that may have more information about the event (e.g. www.citysummerfest.org). The URL is shown on the Events Detail page and **IS NOT** a direct link from the Events Calendar listing.

- **Show Contact** – Specify whether or not to show contact information by selecting "Yes" or "No."

- **Contact** – Select a user from the dropdown menu to serve as the contact for the event. If the user does not exist in the list, you can use the quick add feature to add the user to the system. Note that by default, users added in this manner do not have access to the eGov Manager.

- **Location –** the user can either configure a location or associate an existing location from the Locations & Facilities Directory.

- **Time –** this is a required date for the Event that is the actual date for the Event. Note that there are options for recurring and check boxes above the start date and end date to designate all-day events or events with no scheduled end time (e.g. for City Council meetings). For more information on setting recurrence patterns, see the section below.

- **Classification –** the Classification section enables a user to associate this event to one or more Departments, Divisions, Topics, Subtopics, Categories or Subcategories so that either they appear in a Content Window (e.g. on a Board page) or appear in the "More Information" page as a link.

- **Event Type -** Event types can be configured within the Configure section and are used to filter the Events by specific types (e.g. holidays, public meetings, etc.).

ACCESS TAB

- Use this option to configure activation and/or expiration dates for appearing within the website.

DESCRIPTION TAB

- Use the WYSIWYG (What You See Is What You Get) editor to create a detailed description of the event. The description is provided on the Event Details page along with various other fields describing the event (location, contact, etc.).

Consider including a link to a filtered view of the document center to provide an easy way to access meeting agendas.

- Ticket information is an additional optional field that is formatted with the Event Description to provide specific information about tickets for the event.

RECURRING EVENTS

Events can be configured with recurrence patterns so that they appear within the events calendar according to specific dates or days of the week. The table below illustrates two specific examples:

Example	
Specific Date	**Specific Day**
Every January 15th at 5:30PM	Every 2nd Tuesday of the month at 7:00PM

SETTING OCCURRENCES

Recurring events can be configured either for a specific number of occurrences (e.g., to create the next year's events for a meeting that recurs monthly, use 12) or until a specific date. Either enter a number of occurrences in the input provided or add a specific end date for the recurrence pattern.

MODIFYING RECURRING EVENTS

Once you have created a recurring event, you can either change a specific event that has been created (e.g. the June 24th meeting) or you can change the entire series of events.

Select the "Change this Event" or "Change All Events from This Date Forward" at the top of the "Modify Event" page.

MODIFYING OR DELETING AN EVENT

After choosing the Modify/Delete option, you will be able to access a list of events that can either be updated or deleted. Be sure to use the Search box at the top of the list of events in order to find the particular event that you need to manage.

Also note that the system CREATES events for all events that are RECURRING EVENTS. Thus, you can change information about a specific event or update (or even delete) the entire series.

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FREQUENTLY-ASKED QUESTIONS (CONTENT)

THIS SECTION IS NOT YET COMPLETE.

Index commonly sought after information, and accept ideas for additional information by encouraging the public to submit new questions.

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IMAGE GALLERY & SLIDE SHOW (CONTENT)

The Image Gallery is the central repository for images that you use within your website. Unlike MS Word, any and all files (other than PDF documents) that you use within your website need to be individually uploaded so that they are web accessible. Images should be organized into directories (or folders) and generally these are organized by Department. A specific directory can be designated as a "Slide Show" which creates an interactive display of these images on your public website.

Slide Show URL: http://your_website.com/egov/apps/slide/show.egov

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to upload images that you can use within your website;
- A general understanding of how to insert images into various types of content;
- An understanding of Slide Shows and how to link to a specific slide show gallery;

VIDEO: ADDING IMAGES FOR YOUR WEBSITE

See Section 4 under "Video Tutorials" in the eGov Manager Help for a video that provides direction in adding images to the Image Gallery so they can be used within your website. This video also covers batch uploading of images.

VIDEO: INSERTING IMAGES INTO PAGES

See Section 4 under "Video Tutorials" in the eGov Manager Help for a video that provides direction in using the Image button in the HTML Editor to add an image from the Image Gallery.

IMAGE GALLERY FUNCTIONS

Within the eGov Manager's Image Gallery, a user can perform the following functions:

- **Add** – Upload an Image.

- **Modify** – Modify or delete an Image within the Image Gallery. This could include replacing an image with an image of a different size.

Batch Upload – Add multiple images at the same time.

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MAP BUILDER (CONTENT)

The eGov Map Builder enables both non-technical and advanced users to create maps with easy to use yet powerful drawing functions. The system is integrated with the Google Maps API and includes an easy-to-use interface for adding points and districts to an interactive map. Key functions include:

- Quickly locate points or place map markers on a Google map; and
- Create layers by overlaying KML or KMZ data from your existing GIS system.

Map Builder URL: <your domain>/eGov/apps/map/viewer.egov

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to create a map with points of interest and districts;

MAP BUILDER FUNCTIONS

Within the eGov Manager's Map Builder section, a user can perform the following functions:

- **Add** – Create a map and add markers (points on a map), lines or districts.
- **Modify** – Modify, delete or copy an existing map. Users can also make maps active or inactive. The list of maps can be filtered by map type or active status.
- **Overlays** – Add Overlays, to be used in your maps, from your GIS system.
- **Template –** Control various aspects of the look-and-feel of the map including: setting map size; showing layers; and showing map marker details (like icons, title, and description).
- **Configure –** Create map types for organizing maps on the Map Viewer home page.

ADDING A MAP

The Add function enables the user to create a new map. When adding a map, the user will see the following tab options:

GENERAL TAB

- Provide a name for the map.
- Classify the map to a Department, Category and Topic.

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DESCRIPTION TAB

- Provide a Short Description and Full Description that can be configured within a Map Template to display on a map page. In general, they are helpful in being able to provide direction to the user regarding the purpose of the map.

MAP TAB

- Add map markers, lines and polygons.

MODIFYING A MAP

Choose **Modify** under the Maps header in order to access a list of the maps for which you are authorized to edit. There are four actions that you can take on any particular map:

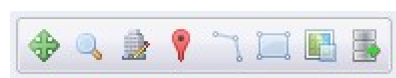
- **Edit** - By selecting this icon, the user will have the ability to modify the General, Description & Map settings of the selected map.

- **Delete -** By selecting this icon, the user will be prompted with a confirmation message to delete this map and all associated markers and lines.

- **Copy –** By selecting this icon, the user will be able to copy all settings for the map and map markers & lines that have already been added to this map.

- **Status -** Toggle INACTIVE and ACTIVE in order to make this map appear or not appear within the Landing Page.

ADDING MAP POINTS & LINES



With the eGov Map Builder, users can easily add map markers, polylines and polygons. Select **Map** when you are either Adding or Modifying a map. In the upper left-hand corner, you will find the **Map Editing Toolbar** (see image to the right).

MAP EDITING TOOLBAR ICONS

The Map Editing Toolbar items can be broken down into the following four functions:

Pan - In order to pan through a map, place your cursor within the map and **left-click** on the mouse button. The hand icon will enable you to move your map view.

Zoom - The magnifying glass icon (Zoom) enables you to configure two key items for website visitors viewing your map: (1) the location of the map; and (2) the zoom level. Simply use the navigation components within the Google maps to find the exact location and zoom level that you like - then **left-click** this icon and choose ***"Set Current View as Map Center & Zoom Level".*** Other values let you return to default settings within the Map Viewer.

Address - Use this feature to jump to a specific US address. This is helpful when adding map markers or when finding a location to set the current view (see "Zoom" above). An entry box for "Point" will automatically be displayed after you find the address that you are seeking.

Point - You can also set a point manually. First, find the location on the map (e.g. an intersection). Next, select the "Point" icon. Now, go back to your map and **left-click.** You will then be prompted with an entry box that enables you to add details related to that specific point (see below for more information).

Polylines - The Map Builder Polyline support will enable you to draw a line (e.g. a bike route) within your map. To set a polyline, find your start point; select the **polyline icon,** and **left-click** on the location. Now, within the map, go to the destination point of your line, and **left-click** again. You should now see a line connecting your two points. **To end your line, double-click on the ending point within your map.** You will then be presented with the Edit Details dialogue box.

Polygons - The Map Builder polygon support will enable you to draw a line (e.g. a bike route) within your map. To set a polyline, find your start point; select the **polyline icon,** and **left-click** on the location. Now, within the map, go to the destination point of your line, and **left-click** again. You should now see a line connecting your two points. **To end your polygon, double-click on the ending point within your map.** You will then be presented with the Edit Details dialogue box.

Overlays - An overlay enables a user to upload a KML or KMZ data file (as exported from a GIS program). Please consult your GIS coordinator to utilize this feature within your map.

EDITING DETAILS FOR POINTS, POLYGONS & POLYLINES:

The Map Builder enables you to add a variety of details to your map point - when a user clicks on your point, they see the following information which you can manage as you add a Point (see above). Items include:

- Assign to a Layer
- Description
- Link Source
- Link Text
- Map Icon

CREATING LINES & POLYGONS

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With the eGov Map Builder, you can create lines and polygons for items such as:

- Bike Paths
- Bus Routes
- Council Districts
- Community Boundaries

Most of the issues that users have encountered in generating lines and districts within the eGov Map Builder are due to not successfully completing your line or district. Always remember the following:

- Begin your line or district with a **single click**;

- End your line or district either by (1) **double-clicking** (you will then be presented with the Edit Details box); or (2) go to the Map Editing Toolbar and "**click off**" the line or district.

If you have districts or regions that you need referenced in multiple maps, use the "Overlays" tool to upload a KML file of these points. Note that once uploaded you cannot easily change the KML points but you can add points, lines and districts on top of it. Remember that you can save a KML of districts or regions that you've created within the eGov Map Builder - look for a link to that file at the end of your map (public view only).

CREATING LAYERS FOR MARKERS & LINES

USING LAYERS

Any Point, Polygon or Polyline can be associated to a Layer. You associate a layer by selecting it when you are Edit Details for your map element. On the Citizen side, a template can be configured to show your layers or can be configured not to show layers. The map below is configured to show layers (note the layers box to the right).

MANAGING LAYERS

You can add new layers within the Edit Details dialogue box. You can also add, delete and rename these layers by selecting the "Elements" box that is in the upper right-hand corner of the "Map" window.

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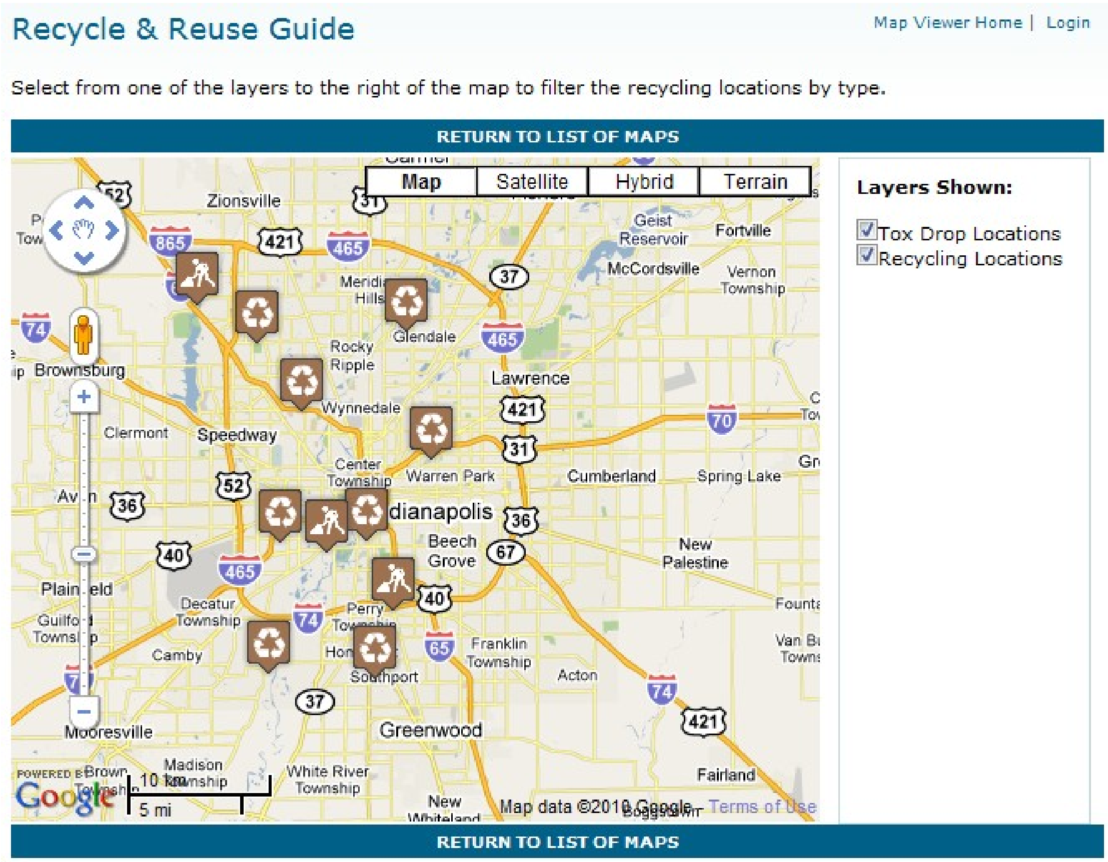

INTEGRATING MAPS INTO YOUR WEBSITE

You can integrate maps in one of two ways:

CREATE A LINK AS A DOCUMENT OR SERVICE

- Simply view your map from within the Map Viewer Landing Page (this will always be located at http://(your_website_domain)/egov/apps/map/viewer.egov). Then cut-and-paste the URL field into either 1) the URL field of a "LINK" document; or 2) the URL field within a Service.

INTEGRATE WITHIN A WEB PAGE

- Use the following iframe code (note: you will need to select the HTML View within the HTML Editor in order to place this code):

<iframe src="http://(your website url)/eGov/apps/map/viewer.egov?view=map;id=1;device=iframe" style="height:400px; width: 100%; border:none;">

*where **height and width** can be specified as you'd like and* **id=1** *should be the ID of the map that you want to integrate.*

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To find the map ID, select Modify under the Map Viewer tab in the eGov Manager & look for the ID:

Order Maps

Maps 1-2 of 2

Edit	Delete	Copy	Status	F	ID	Order By	Title	Type	Created On	By	Modified On	By
Edit	Delete	Copy	Active	No	3	1-1	Bikeways		03/17/11	AS	07/21/11 10:30	IU
Edit	Delete	Copy	Active	No	2	2-1	Police Check Lane		03/17/11	AS	03/17/11 09:31	AS

Maps 1-2 of 2

MANAGING TEMPLATES

The Templates feature of the Map Builder enables you to customize the specific look-and-feel of your map. While eGov will provide you with 3-4 standard templates, use the "Template" section to edit and customize these templates as you see fit. You can also contact the eGov Support team - but additional hourly rates may apply.

Below are some examples of settings within the Templating system that enable you to customize the presentation of your map in various ways:

LAYERS - The following sample code will display a box that lists all of the Layers for your map;

```
<div id="mapLayerToggleContainer" style="float: right; width: 20%; height:480px; border: 1px solid #c1dbdd; padding: 10px">
 <strong>Layers Shown:</strong><br/><br/>
 {repeat Layers}
    {Checkbox}<br />
 {end}
```

ICONS, TITLES & DETAILS - The following sample code will list map marker information (the associated icon, title & description):

```
<ul id="eGov_markerList" style="margin:0; padding:0; list-style-type: none;">
  {repeat Placemarks}
  <li class="eGov_markerListItem" style="background:transparent url('{Icons}') left 8px no-repeat; list-style-type: none; margin: 0; padding: 8px 8px 26px 47px; border-bottom: 1px solid #c4c4c4;">
     <a href="javascript:google.maps.event.trigger(eGov_mapObject.option['element']['{id}']['obj'],'click');"><b>{name}</b></a>
     <br />
     {if description}
     <span class="eGov_markerListItemDescription">{description}</span>
     {end}
  {end}
</ul>
```

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MOBILE APPS (CONTENT)

Currently, there are no configurable settings needed for eGov's wide array of mobile solutions.

Mobile Website URL: <your domain>/mobile

For responsive design clients, your entire website is designed to scale to the size of the browsing device. Thus, there is no official website URL.

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PROPERTIES DATABASE (CONTENT)

The Properties Database enables economic development administrators to publish information about available commercial properties within the City. The searchable and index-able listing makes it easy for constituents to filter properties of most interest to them.

Properties Database URL: <your domain>/eGov/apps/properties/listing.egov

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to add properties to the Properties Database;

PROPERTIES DATABASE FUNCTIONS

Within the eGov Manager's Properties Directory, a user can perform the following functions:

- **Add** – Create a property.
- **Modify** – Modify, delete or copy a property for the directory. Users can also make properties active or inactive. The list of properties can be filtered by property type or active status.
- **Configure** – A Webmaster or Project Manager has the additional ability to create classifications for items within the Properties directory.

ADDING A PROPERTY

The Add function enables the user to create a new property for the database. When adding a property, the user will see the following tab options:

GENERAL TAB

- Provide a name for the Property and an image, if desired.
- For Classification, generally, you can just select the Home Page department as Department, Division & Topic classification is not generally used within most websites.

ACCESS TAB

- Configure the property's activation or expiration dates.

DETAILS TAB

- Complete additional information about the property such as its GIS location, Parcel information, square footage, etc.

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DESCRIPTION TAB

- Provide a description of the property that will appear when someone selects this property from the database.

SOCIAL MEDIA & ALERTS TAB

- If you want to maintain a list of individuals who get updates regarding new properties added to the database, create a subscription list (see "Social Media & Alerts" section) and generate a notification to the appropriate list from this tab.

MODIFYING & DELETING PROPERTIES

Use the "Modify/Delete" link from the Properties Database navigation menu to modify a property previously added through the eGov Manager or to remove a property from the database.

BROWSING PROPERTIES

- Clicking on the "Mod" button will allow the User to modify a property in the same manner in which it was created.

- Clicking the "Del" button will permanently remove the property from the system.

- Clicking the "Active" button has a "toggle" effect – making the property "Inactive". Clicking the "Inactive" text will return the property back to "Active'" state.

FINDING YOUR PROPERTY

By default the properties are listed by the order of their date of posting. Clicking on the column headers will re-sort the list according to the information contained in that column.

If your property is not readily found in the list of properties, use the search box (see image above) at the top of the Modify screen to limit the browsed properties. Provide keywords in the search box that could match words or phrases in the property title.

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SERVICES DIRECTORY (CONTENT)

The Services Directory enables staff members to create dynamic, updateable pages to provide information on government functions like snow removal and public education programs. Generally, Department web pages are configured with an area (also referred to as a "Content Window" that lists out related services; these are also accessible via the website's Services Directory that lists all services by name and topic.

The Services Directory is also commonly used as a "How Do I?"

Services Directory URL: <your domain>/eGov/apps/services/index.egov

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to add services to your website;
- To understand where services appear within your website;

SERVICES DIRECTORY FUNCTIONS

Within the eGov Manager's Services Directory, a user can perform the following functions:

- **Add** – Create a service directory entry.
- **Modify** – Modify, delete or copy a service directory entry. Users can also make services active or inactive. The list of services can be filtered by service type or active status.
- **Configure** – A Webmaster or Project Manager has the additional ability to create unique service types (e.g. interactive, informational, etc.).

ADDING A SERVICE

The Add function enables the user to create a new entry for the Services Index. When adding an entry, the user will see the following tab options:

GENERAL TAB

- Provide a name for the service and select a Service Type. The landing page has a link that enables users to see all Services by type.
- If you put a URL in the URL field, this Service will not show the Description but instead will take the user to that website whenever this Service is selected.
- For Classification, associate this service to the appropriate Departments, Divisions, Topics, Subtopics, Categories and Subcategories where it should appear.

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ACCESS TAB

- Configure the service's activation or expiration dates (when it should appear or disappear from the Directory).

DESCRIPTION TAB

- Provide a general description of the service. If you are using the Service as a "How Do I?" the short description will often serve as the long name for this Service (e.g. How Do I Pay a Parking Ticket).

SOCIAL MEDIA & ALERTS TAB

- If you want to maintain a list of individuals who get updates regarding new entries added to the Directory, create a subscription list (see "Social Media & Alerts" section) and generate a notification to the appropriate list from this tab. You may also want to send notifications to residents who subscribe to City updates when you add a new interactive service.

MODIFYING & DELETING SERVICES

Use the "Modify/Delete" link from the Services Directory navigation menu to modify an entry previously added through the eGov Manager or to remove a service from the Directory.

BROWSING SERVICES

- Clicking on the "Mod" button will allow the User to modify a service in the same manner in which it was created.

- Clicking the "Del" button will permanently remove the service from the system.

- Clicking the "Active" button has a "toggle" effect – making the service "Inactive". Clicking the "Inactive" text will return the service back to "Active'" state.

FINDING YOUR SERVICE

By default the services are listed by the order of their date of posting. Clicking on the column headers will re-sort the list according to the information contained in that column.

If your service is not readily found in the list, use the search box (see image above) at the top of the Modify screen to limit the browsed entries. Provide keywords in the search box that could match words or phrases in the service name. You can also limit the service types displayed by selecting the drop-down menu item.

SNIPPETS (CONTENT)

One of the major goals of the eGov Manager V6 release is to ensure that client websites – and particularly client home pages – are designed so that all content areas can be edited by clients.

To this end, the Snippet enables eGov to configure templates with configurable areas that do not fit into the structure of any other eGov content type. Some examples of the use of snippets include the following:

- An area on the home page where the client would like to upload their own graphics that link to prominent services and areas of interest within the website.

- An area on the home page that contains an Emergency Alert icon and a short description. The Emergency Management Agency needs to be able to update the text and graphics in emergency situations.

Snippets URL: N/A – a snippet could be configured within the home page template or one or more department, topic or category templates.

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to understand what a Snippet is;
- To understand how to update a Snippet;

SNIPPET FUNCTIONS

Within the eGov Manager's Snippets or HTML Editor tab, a user can perform the following functions:

- **Add** – Create a Snippet. Generally, these will be created by eGov and added to a template.

- **Modify** – Modify, delete or copy a Snippet. A client will need to be able to modify Snippets but in most cases ***should not*** delete or copy Snippets.

- **Configure** – Generally, Snippet types will be configured by eGov as part of the Snippet setup process.

MODIFYING A SNIPPET

The Modify function enables the user to modify the information within a Snippet that has been created and configured by eGov. When modifying a Snippet, the user will see the following tab options:

GENERAL TAB

- Name of the Snippet.

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- Classification is the pages where this Snippet appears.

DESCRIPTION TAB

- This is the WYSIWYG description that should be edited by the Client to provide the desired information.

EDITING THE CORRECT SNIPPET

Use the “Modify” link from the Snippets left-hand navigation menu (under “Content”) to modify the information contained within a Snippet. Note that you should not delete or copy Snippets.

eGov will provide Clients with the name of their Snippet OR the client can gain access to the specific Snippet that they need by using Front-End Edit. The Quick Edit link will jump the user directly into the appropriate Snippet for editing.

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SERVICES

The following section will feature information managed within the **Services Section** of the eGov Manager. Key sections include:

- Action Center
- Payment Center
- Registrations
- Facility Registration

ACTION CENTER FOR ONLINE FORMS (SERVICES)

The Action Center enables citizens to report problems and complete online service requests for various government services: abandoned vehicles, trash pickup problems, etc. Key features for staff include the following:

- Create and Modify Action Center Items
- Track the Status of Submitted Items
- Access Reports of Submitted Items
- Configure Action Item Types and Other Settings

Action Center URL: <your domain>/eGov/apps/action/center.egov

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to create online forms for your website;
- To be able to resolve submitted action items;

VIDEO: CREATING ONLINE FORMS

See Section 5 under “Video Tutorials” in the eGov Manager Help for a video that provides direction in creating online forms for the Action Center.

VIDEO: HOW A CITIZEN USES THE ACTION CENTER

See Section 5 under “Video Tutorials” in the eGov Manager Help for a video that provides an overview of how a registered constituent and a non-registered constituent submit Action Center items.

VIDEO: RESOLVING AN ACTION ITEM

See Section 5 under “Video Tutorials” in the eGov Manager Help for a video that provides an instruction on using the Status function to resolve Action Items.

ACTION CENTER FUNCTIONS

Within the eGov Manager's Action Center application, a user can perform the following functions:

- **Receive** – Enables a staff member to submit an action item on behalf of a constituent.

- **Status** – Change the status of a particular response submitted by a constituent via the eGov Manager. To change the status of an item, select the action item type and then select "modify". Various reports regarding submitted action items are also available here.

- **Add** – Create or modify an action item. Create an online form, add or update fields, activate or deactivate an action center item or change the confirmation message sent to constituents. The Manage section is also where you can add users and configure them with various levels of access – from viewing submitted items, to Editing Action Item forms to Updating the status of submitted action items.

- **Modify** – Modify, delete or copy an existing action item and update any of the fields generated by adding the form.

- **Reports** – Get more detailed status reports including an Item Report and a Workflow Report.

- **Configure** – Enables the Webmaster to add or modify action item types (groups of action items – e.g. feedback items).

ADDING AN ACTION ITEM

The Add function enables the user to create a new Action Item (online form). When adding the Action item, the user will see the following tab options:

GENERAL TAB

- Select the appropriate "type" of action item. These can be configured by the Webmaster using the Action Center's "Configure" function.

- Provide the title, which is the name of the Action Item (e.g. Report an Abandoned Vehicle).

- Allow Tracking determines whether a citizen can track the status of their request online via the My Community portal or the Action Center home page.

CLASSIFICATION TAB

- Select the Department & Division and Category pages to which this Action Item should be associated. Keywords aid in finding this Action Item through the site search engine.

FORM FIELDS TAB

The form field builder enables the user to configure various types of fields as well as header text,

- **Add Field** – The Display Name will be the name displayed next to the field. The Field Name is not generally important in most implementations but is used in some cases for integration to

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back office systems (generally a Field Name will not include spaces). Use the Field Type selection to choose the appropriate type of form – ranging from a one line text box to standard fields such as email and telephone.

- **Add Header** – A header is used to break up different areas of the form – for example, a form may have a Header for Contact Information and a header for Service Request Data.
- **Add Sample** – Use this selection to create a sample entry box that has a border and is centered on the form.
- **Reorder** – This function enables you to drag-and-drop bars that represent fields, headers and sample areas so that you can arrange the form the way that you wish.

CONFIRMATION TAB

- **Confirmation Message** – Complete this section to provide a confirmation message (e.g. "Thank You for submitting your request regarding an abandoned vehicle").
- **Service Norm** – Add a stated "Service Norm" (e.g. "Generally, we process requests within 2-3 business days") to provide the citizen with an idea of the government's protocol with respect to acting upon their submission.

USER ACCESS TAB

- **Select User** – Type in the name of an eGov Manager user (Webmaster, Project Manager, Administrator or Content Provider) and pause until a list of matching users is found. Then, select the appropriate user.
- **Add Appropriate Notifications**
    - Initial:
    - Reminder (value set in 'Workflow' tab):
    - Escalation (value set in 'Workflow' tab):
    - Modify Item
    - Delete Item
    - Accept Submissions
    - View Submissions

      Fulfill Workflow

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PAYMENT CENTER (SERVICES)

The Payment Center enables local governments to create and deploy a wide variety of payment items for their website. Key features include:

- Create and Modify Payment Center Forms
- Configure Financial & Banking Information
- Track the Status of Submitted Payment Items
- Access Reconciliation Reports
- Configure Payment Types and Other Settings

Payment Center URL: <your domain>/eGov/apps/payment/center.egov

GUIDE: ENTERPRISE PAYMENT PORTAL OPERATIONS MANUAL

eGov has created a separate Training Manual (PDF format) for all payment center functions (known as the Enterprise Payment Portal). Please contact your eGov representative and request this manual if you have not received a copy.

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REGISTRATIONS (SERVICES)

Program Registration within eGov Manager v6 is accomplished via the eGov Enterprise Payment Portal functions.

For information about payment functions, please contact your eGov project leader for a copy of the eGov Enterprise Payment Portal Training Manual.

Program Registration URL: <your domain>/eGov/apps/payment/center.egov

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FACILITY REGISTRATIONS (SERVICES)

Facility Registration within eGov Manager v6 is accomplished via integration between the eGov Locations & Facilities Directory and the eGov Enterprise Payment Portal.

For information about the Locations & Facilities Directory, visit that section of this document. For information about payment functions, please contact your eGov project leader for a copy of the eGov Enterprise Payment Portal Training Manual.

Facility Registration URL: <your domain>/eGov/apps/locations/facilities.egov

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E-BILLING

The following section will feature information managed within the **Content Section** of the eGov Manager. Key sections include:

- E-Billing

ONLINE BILL PRESENTMENT & PAYMENT

The E-Billing module for the eGov Manager enables clients to deploy online bill presentment and payment functions for their Enterprise Payment Portal.

eGov has created a separate Training Manual for all Enterprise Payment Portal functions. Please contact your eGov representative and request this manual if necessary.

E-Billing URL: <your domain>/eGov/apps/bill/pay.egov

GUIDE: ENTERPRISE PAYMENT PORTAL OPERATIONS MANUAL

eGov has created a separate Training Manual (PDF format) for all payment center functions (known as the Enterprise Payment Portal). Please contact your eGov representative and request this manual if you have not received a copy.

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SOCIAL MEDIA & ALERTS

The following section will feature information managed within the **Social Media & Alerts Section** of the eGov Manager. Key sections include:

- Social Media & Alerts

SENDING ALERTS & MANAGING SUBSCRIBERS

The Social Media & Alerts functions of the eGov Manager enable users to manage subscription lists and generate Quick Message alerts that can be posted to social media sites or sent to email & SMS subscription lists.

Social Media & Alerts URL: <your domain>/eGov/apps/eGov/connect.egov

LEARNING OBJECTIVES & RELATED RESOURCES

- To be able to generate Quick Message alerts and send them to social media websites, email lists and SMS lists;
- To be able to upload a list of email users to create an email subscription list;
- To configure an SMS subscription list;

VIDEO: POSTING TO SOCIAL MEDIA & SENDING QUICK MESSAGE ALERTS

See Section 6 under "Video Tutorials" in the eGov Manager Help for a video that provides direction in how to send out a Quick Message Alert and post to Social Media websites.

VIDEO: SETTING UP INTEGRATION TO FACEBOOK

See Section 6 under "Video Tutorials" in the eGov Manager Help for a video that provides direction in how to use the Social Media Settings function to setup integration to Facebook.

VIDEO: SETTING UP INTEGRATION TO TWITTER

See Section 6 under "Video Tutorials" in the eGov Manager Help for a video that provides direction in how to use the Social Media Settings function to setup integration to Twitter.

SOCIAL MEDIA & ALERTS FUNCTIONS

Within the eGov Manager's Social & Media Alerts, a user can perform the following functions:

- **Messages** – Create and send simple alerts to social media websites and subscription lists;

- **Subscribers** – Modify, delete or copy subscription lists used to send notices to email or SMS subscribers; a service directory entry. Users can also make subscription lists active or inactive.

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;

- **Statistics** – View the results of an email or SMS alert to verify if the message has actually been sent;

- **Templates** – Modify, delete or copy templates for sending email alerts. Currently all templates are configured for you by eGov. Client managed templates is a FEATURE that IS IN-PLAN AND NOT YET AVAILABLE.

- **Configure** – A Webmaster or Project Manager has the additional ability to create unique subscription types (e.g. Council Notices, Newsletters, etc.).

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SETTINGS

The following section will feature information managed within the **Settings Section** of the eGov Manager. Key sections include:

- Configure eGov Manager Settings

CONFIGURE EGOV MANAGER SETTINGS

THIS SECTION IS NOT YET COMPLETE.

Settings URL: N/A

LEARNING OBJECTIVES & RELATED RESOURCES

- To be completed;

SETTINGS FUNCTIONS

Within the eGov Manager's Social & Media Alerts, a user can perform the following functions:

- **Social Networking** – Configure integrations to social media websites like Facebook & Twitter for publishing in the Social Media & Alerts functions;

- **Workflow** –Modify, delete or copy custom workflows used within the Action Center & Payment Center applications to create logical steps for closing an item. Users can also make workflow active or inactive. The list of workflows can be filtered by the application that they're created for or active status;

- **Navigation Builder** – For sites configured with editable site-level navigation, modify items within the website's navigation;

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ASSISTANCE

The following section will feature information managed within the **Assistance Section** of the eGov Manager. Key sections include:

- eGov Manager Help

EGOV MANAGER HELP SECTION

The Assistance area provides access to eGov Manager Help documentation, User Guides and training videos. In the future, this section will also be used to coordinate requests to support for eGov Manager Assistance.

Assistance URL: <your domain> /eGov/help/HelpFinal_v6.htm

LEARNING OBJECTIVES & RELATED RESOURCES

- To understand the variety of help available for using the eGov Manager;

ASSISTANCE FUNCTIONS

Within the eGov Manager's Social & Media Alerts, a user can perform the following functions:

- **Help** – Find online help documentation for using the eGov Manager.

USING THE EGOV MANAGER HELP

You will see references to the following sections of the eGov Manager Help:

- **Getting Started** – provides information on logging into the eGov Manager e the "Getting Started" section within the eGov Manager Help;

- **User Guides** – a set of "How To" guides for high profile functions;

- **Video Tutorials** – a series of six lessons on various eGov Manager topics;

- **Remaining Help Sections –** the remaining help topics duplicate the content within this document.

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