

## ABOUT THIS GUIDE

This comprehensive **User Guide** provides screenshots and lessons helpful in understanding strategy and techniques for using the eGov Manager Website Management Platform.

### Using the Lessons

If you're just looking to brush up on your skills or already feel comfortable with many aspects associated with using the eGov Manager, jump to the "**Lessons**" within each Chapter. The lessons are designed to provide "shortcuts" to how you do key functions such as editing your department home page, adding a topic, uploading a document, etc.

See the **Table of Contents** on page 2 for a list of Chapters & their associated Lessons.

### About the eGov Manager Editing Interfaces

The eGov Manager enables you to make updates in two ways – via the traditional "eGov Manager" interface where content is organized by type and with "Front End Edit" where you edit from the "Public View" of your website. With the Quick-Edit pencil, you can make changes directly on the page. In other cases, Quick Edit links will take you to the right place within the eGov Manager to make your change.

**Chapter 2 – eGov Manager Editing Interfaces on page 5** will provide more details on these two editing approaches. For both cases, you will need to 1) securely login to the eGov Manager with a username & password; and 2) open the "Public View" of the page you're editing in another browser tab.

### Additional Help

If you get stuck on a section, please see these additional resources available within the "Assistance" tab of the eGov Manager:

- **eGov Manager Comprehensive Training Manual**
- **eGov Manager User Guides**
- **eGov Manager Training Videos**

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## CHAPTER 1 – LOGGING IN TO THE EGOV MANAGER

The URLs you see below will lead you to your new website and where you can log in to access the eGov Manager. Please note that these are sample URLs.

**Website:** www.yourwebsiteaddress.com  
**eGov Manager:** www.yourwebsiteaddress.com/**manager**

### USERNAMES & PASSWORDS

By default, passwords need to be at least six (6) characters in length and in most cases require a number or a special symbol. These settings can be altered to be more or less strict.

Your initial password will be configured by your Webmaster for your use and you will likely be prompted to change your password once you've logged in to the eGov Manager.

eGov Manager  
**Please Log In**

Enter your login information below.

Username  Password

Forgot your username or password? Enter your email address below to search.

Type your email address in the box above and click "Find."

### RESETTING USERNAME OR PASSWORD

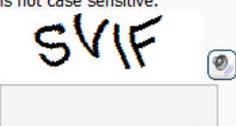
In the event that you do not remember either your username or your password to login to the eGov Manager, go to the login screen and do the following:

- Go to the **eGov Manager Login** screen.
- Type your **email address** into the space provided under username/password and click Find.
- Select the option to either **reset your password** or **send you your username**.
- An email from "**Webmaster**" will be sent to the email address provided.

eGov Manager  
**Email Found**

Please complete the word verification, choose whether you would like your username or your password emailed to you, and then click 'Email Reminder' to complete your request.

**Word Verification** \* Type the characters you see in the image below. Verification is not case sensitive.



**Email Me** \*  A New Password  My Username

Make a selection and click "Email Reminder."

### VIDEO TUTORIAL:

For additional assistance, look for "Video 1 – Getting Started w/ eGov Manager". You can find all of our videos under "Assistance" and "eGov Manager Help" – look for the Video Tutorials section.

## CHANGING YOUR PASSWORD

Once you have successfully logged into the eGov Manager, you can change your password by accessing the “My Password” option in the left-hand navigation. The **My Account** function enables you to modify your username, official email address, name and title.



### Lesson 1.1 - Log into the eGov Manager

1. Find your instance of the **eGov Manager** (*note: it is generally websiteaddresshere.com/manager*)
2. If you don't have your username and/or password, issue a reset from the login screen so that you can login successfully

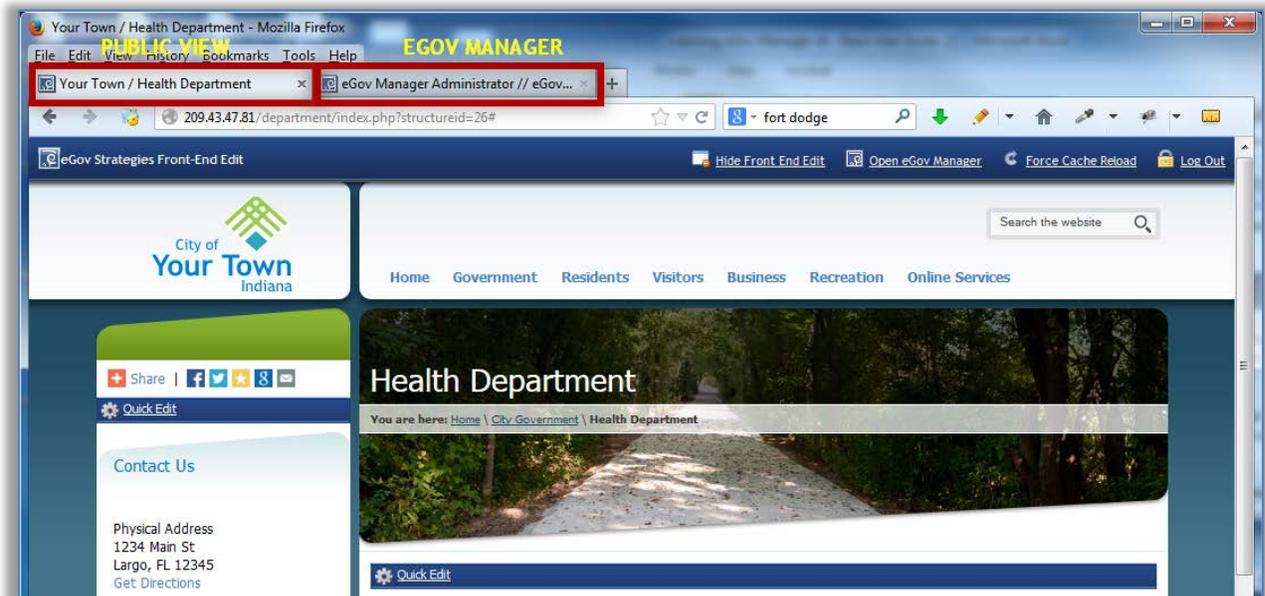
### Lesson 1.2 – Reset your Password

1. Login to the **eGov Manager**
2. In the left-hand navigation, go to the **My Password** function under **Users** and reset your password by following the prompts

## CHAPTER 2 – EGOV MANAGER EDITING INTERFACES

The eGov Manager features two interfaces for making changes to your website – the **Front End Edit** interface and the standard **eGov Manager** interface. When using either interface, it is important that you utilize two browser tabs for optimal results.

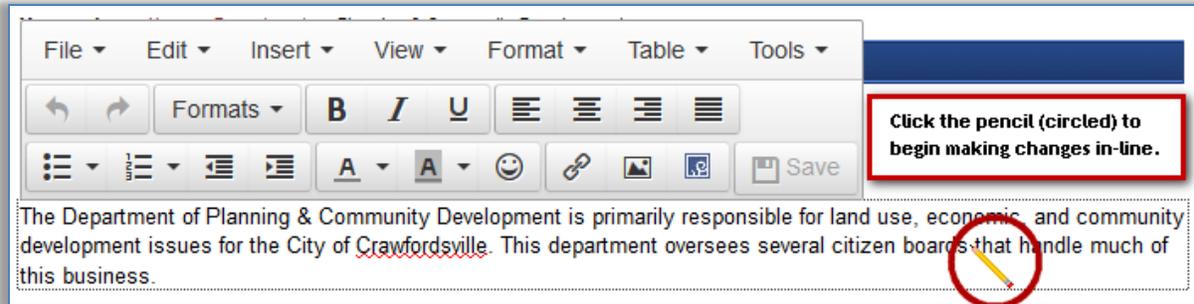
1. **Public View** - In one browser tab, you should be viewing your current website for which you are making changes. You can actually make changes from the Public View to select content – but you **STILL** will need to be logged into the eGov Manager; thus,
2. **eGov Manager** – In another browser tab, you will need to login to the eGov Manager.



## FRONT-END EDIT

For Department, Division, Category, Subcategory, Topic & Subtopic pages within your website, you can make changes to the “descriptions” of these pages directly within the **Public View** website. Simply login to the eGov Manager and open a tab to view your website. Navigate to a Department, Division or topic page and look for the Front-End Edit Toolbar at the top of the web page:

The **Description** of each of these pages can be edited directly on the page using the Quick Edit Pencil. Look for a large area of text and place your cursor over the area to see the Quick-Edit Pencil. **Click and make your changes “in-line.” Hit the “Save” button** when you have finished editing. Below, you will find an example from one of your new website’s Department pages:



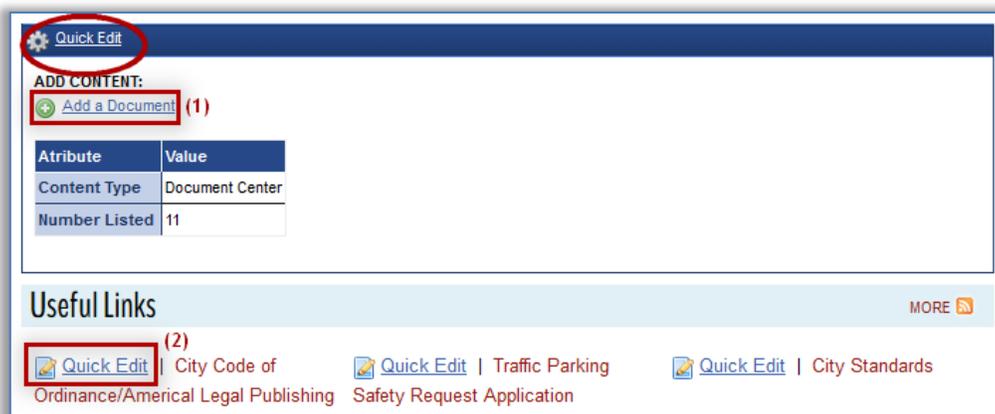
Note that in many cases, the Title of your Department is not included in the Description and thus, cannot be changed via Front-End Edit. See the eGov Manager editing below on how to change the Title.

For more details about ‘Structure’ items within your website, see **Chapter 3 – Managing Your Department Page** on page 7.

## QUICK-EDIT LINKS

When using Front-End Edit, you will generally see multiple **Quick Edit** areas within your website. These editable areas are often referred to as “**Content Windows**” and could contain 1) contact information or 2) a list of any of the following: divisions, topics & subtopics, documents, events, services, action items or payment items. Generally, the **Quick Edit** box is located above (but sometimes right below) the Content Window.

When you click on a **Quick Edit** box (see circle below), you will see the capability to (1) Add Content or (2) Edit existing content. Either of these links **always** jumps you into the eGov Manager where you can then make the change (either in your existing editing tab or via a new window – depending on browser and its settings).



## EGOV MANAGER

You can also use directly use the eGov Manager interface to edit content for your website. Utilize the left-hand navigation within the eGov Manager to find the specific content category that you would wish to update.

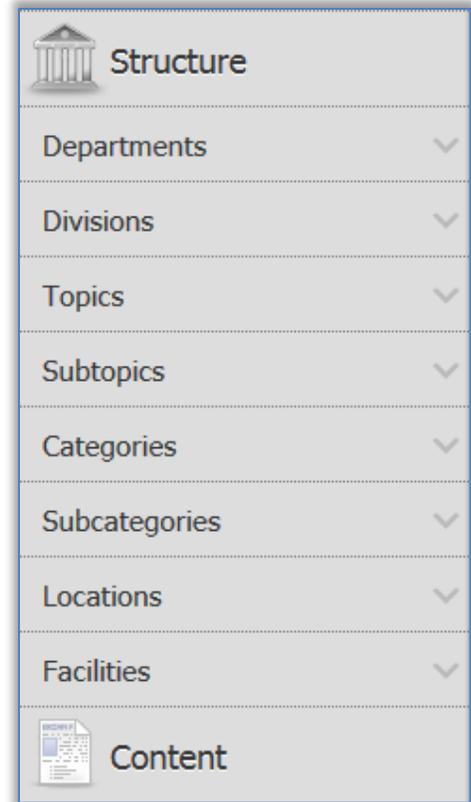
### Use Structure to update the following:

- Departments
- Divisions (e.g. Boards & Commissions)
- Topics (subsections of a Department)
- Subtopics (subsection of a Topic)
- Categories & Subcategories
- Locations & Facilities

### Use Content to update the following:

- Documents
- Events
- FAQs
- Services
- Snippets

*Note that generally – content items are associated to one or more Structure items. They can appear on Structure pages via Content Windows.*



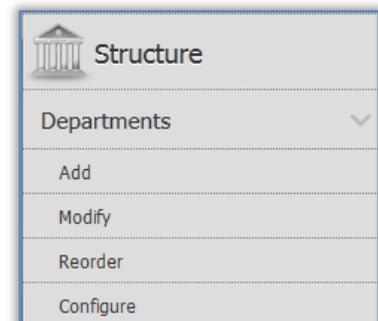
## Lesson 2.1 – Identify the Editable Areas within a Department Page

1. Login to the eGov Manager
2. In another tab within your browser, navigate to a Department page that you can edit
3. Find the following Content Windows within your Department page:
  - a. Department Description – *this is where you can use the Quick Edit Pencil*
  - b. Contact Information
  - c. News & Notices
  - d. Related Pages or Links (essentially, another document editable area)
  - e. Services

## CHAPTER 3 – MANAGING YOUR DEPARTMENT PAGE

The Department page is the main “building block” for organizing content within your website. Department pages have editable areas (called “**Content Windows**” that can include any of the following:

- Contact Information
- Related Divisions (e.g. Boards & Commissions);
- Topics & Subtopics
- News & Notices
- Related Pages (long-term documents, like forms & applications)
- Services



You can access a list of all Departments within your website by using the following URL:

- **Departments Listing URL:** [www.yourwebsiteaddress.com/departments](http://www.yourwebsiteaddress.com/departments)

Also look on this page for a link to other types of “departments” – like *Elected Officials* – and for a link to *Boards & Commissions*.

## STRUCTURE PAGES

While the Department represents the “core” of your website, the eGov Manager features two other “structure” elements that can be edited ALMOST IDENTICALLY to how you manage your Department page. These are:

- Divisions (e.g. Boards & Commissions)
- Topics & Subtopics (sections & subsections of a Department)

When to use a Division or Topic will be covered in **Chapter 5 – Managing Sections (Topics & Divisions)** on **page 12**. Categories/Subcategories and Locations/Facilities are also structure elements – but generally these are managed by Webmasters outside of the realm of a specific Department.

## FROM FRONT-END EDIT

As discussed earlier, the Quick Edit Pencil enables you to make updates to your Department without using the eGov Manager interface. Other types of updates – like contact information or changing the title of your Department – require that you use the eGov Manager interface.

## FROM EGOV MANAGER

Department pages can be found under the **Structure** title in the left-hand navigation. When you select **Modify**, you will see a list of all of the Departments that you are authorized to edit – a Webmaster or Project Manager will see ALL departments configured within the website. Select Edit to view the details of a specific Department.

The screenshot shows the 'Modify Department' form in the eGov Manager interface. The form is titled 'Departments & Divisions' and 'Modify Department'. It has five tabs: 'General', 'Description', 'Divisions', 'Staff Directory', and 'User Access'. The 'General' tab is selected, and the 'General Information' section is visible. The form contains the following fields:

- Type**: A dropdown menu with 'Department' selected. A red asterisk (\*) is next to the label.
- Name**: A text input field containing 'City Home Page'. A red asterisk (\*) is next to the label.
- Short Name**: An empty text input field.
- Status**: Radio buttons for 'Active' (selected) and 'Inactive'. A red asterisk (\*) is next to the label.

The tabs enable you to configure specific content for your Department page. Key tabs for managing your

website include the following:

- **General Tab** – General information about the Department (name, status, department head, location, access rights).
- **Description Tab** – This is where you can edit the home page description for your website. It features a more advanced editor than is available via front-end edit and provides the ability to add images and video content via the HTML Editor.

### Lesson 3.1 – Use Front-End Edit to Update the Description of a Department Page

1. Login to the **eGov Manager**
2. In the **Public View** browser tab, navigate to a Department for which you have edit authority
3. Use the **Quick Edit Pencil** to change the Description
4. Hit **Save** in the Front-End Editor

### Lesson 3.2 – Edit a Department Description using the eGov Manager Interface

1. Login to the **eGov Manager**
2. In the **Public View** browser tab, navigate to a Department for which you have edit authority
3. Click the **Quick Edit** link above your Department description and choose Edit the Description
4. Switch to the **eGov Manager** browser tab (which has either opened or refreshed)
5. **Description Tab** – edit the Department description
6. Hit **Save & Continue**
7. In the **Public View**, refresh the page to verify the change

#### VIDEO TUTORIAL:

For additional assistance, look for the video “Lesson 2 – Managing Department Content”. You can find all of our videos under “Assistance” and “eGov Manager Help” – look for the Video Tutorials section.

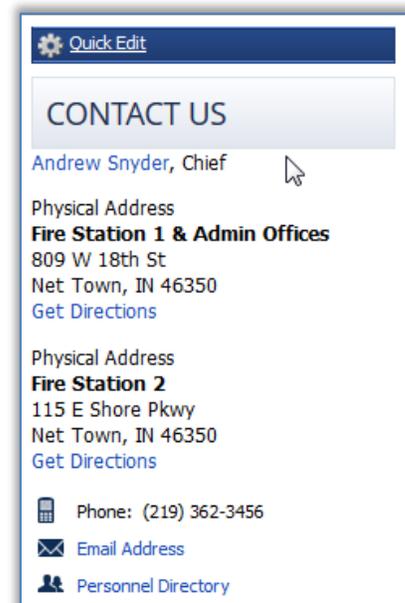
## CHAPTER 4 – MANAGING CONTACT INFORMATION & USERS

An eGov Manager user can add Contact Information for any of the “**Structure**” elements within your section of the website – Departments, Divisions and Topics/Subtopics.

Contact information **MUST BE** added in the eGov Manager because a user can associate multiple phone numbers and addresses to a specific Department, Division or Topic.

#### FROM FRONT-END EDIT

In the **Public View**, look for the Quick Edit drop-down link and choose to “Edit Contact Information” and you will be forwarded to the eGov Manager.



## FROM EGOV MANAGER

Select the appropriate **Structure item** in the left-hand navigation by selecting Department, Division, Topic or Subtopic and choosing Modify to see all possible items that you can edit. Edit the item and you will see that all Contact Information is contained in the first tab – **General Tab**

Note that for Location & Contact information, you can add multiple addresses and phone numbers within the GENERAL TAB. A “best practice” is to associate Locations from your Locations Directory rather than adding in new addresses or intersections. Select **Address Type = Location/Facility**.

The image shows two overlapping screenshots of the eGov Manager interface. The background screenshot is the 'Modify Department' page, with the 'General Information' tab selected. It shows fields for Type (Department), Name (Fire Department), Short Name, Status (Active), Featured (No), Use for Public Filters (Yes), URL (Default), Head (Snyder, Andrew), and Office Hours. The foreground screenshot is the 'Location & Contact Information' tab, which contains a table for addresses and a table for phone numbers.

Address(es)				
Modify	Delete	Address Name	Address	Display To Public
		Physical	809 W 18th St , Net Town, IN, 46350, US	Yes
		Physical	Fire Station 2	Yes

Phone #(s)					
Modify	Delete	Type	Number	Display to Public	Primary
		Phone	2193623456	1	1

Email: fire@nettown.usa

## STAFF DIRECTORY UPDATES

Within the Contact area of a Department, Division, Topic or Subtopic page within a website, an individual can choose the “**Staff Directory**” link to view all associated users. This view will show a user’s **Primary** contact information with a link to the user’s Personnel Details page for additional information that is managed via the “Contact” tab of a User profile.

**Site-wide Staff Directory URL:** [www.yourwebsiteaddress.com/egov/apps/staff/directory.egov](http://www.yourwebsiteaddress.com/egov/apps/staff/directory.egov)

To add users to the Staff Directory, you must first add them as “users” of the eGov Manager system. If they will not need eGov Manager access, you can configure them with “No Manager Access.” Use the **Users** function in the left-hand navigation to add a new user. You can configure their specific membership in a Department or Division’s staff directory by completing the “Staff Directory” tab within the Add/Modify Users function.

The image shows the 'Add User' form with the 'Staff Directory' tab selected. The 'Include in Staff Listing?' checkbox is checked. The 'Departments / Divisions' section has a dropdown menu set to '-- Select One --'. The 'Display to Public' and 'Primary' checkboxes are also checked. There are 'Cancel' and 'Add' buttons at the bottom.

### Required fields include:

- Include in Staff Directory = YES
- Department and/or Divisions
- Display to Public = YES

Note that a user will appear in the Staff Directory for each Department or Division that you select via the drop-down menu.

## MANAGING USERS

Visit the **Assistance – eGov Manager Help – User Guide – Quick Reference Guides** in the eGov Manager to access instructions on **Creating & Managing Users**.

### Lesson 4.1 – Associate an Address, Phone Number & Email to Your Department

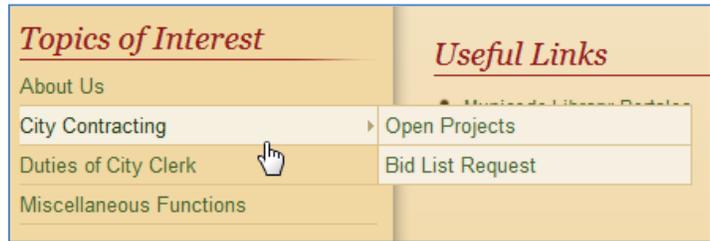
1. Login to the eGov Manager
2. In the **Public View** browser tab, navigate to a Department for which you have edit authority
3. Click the **“Quick Edit”** link above the Contact area of the Department page
4. Switch to the **eGov Manager** browser tab (which has either opened or refreshed):
5. **General Tab** – Update any of the following fields:
  - a. Head
  - b. Office Hours
  - c. Address - can add multiple. Choose Address Type = Location/Facility for best results
  - d. Phone #(s) – can add multiple
  - e. Email

### Lesson 4.2 – Add a User to Your Department’s Staff Directory

1. Login to the eGov Manager
2. In the left-hand navigation of the **eGov Manager**, select **USERS** and then **ADD**
3. **General Tab**
  - Select **User Group** – use **“No Manager Access”** if this person does not need to use eGov Manager features for editing or managing interactive services
  - Provide **Email Address**, a **Username** and enter a **Password** twice
  - Provide **First Name, Last Name** and **Title**
  - Associate at least 1 Department that will have the ability to update this user’s contact information
4. **Contact Tab** if desired.
  - *This is the information that a website visitor sees if they click on the User’s name on the Staff Directory results page*
5. **Staff Directory Tab**
  - **Include in Staff Directory** = YES
  - **Department/Division** of the Department where the user should appear
  - **Display to Public** = YES

## CHAPTER 5 – MANAGING SECTIONS (TOPICS & DIVISIONS)

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:

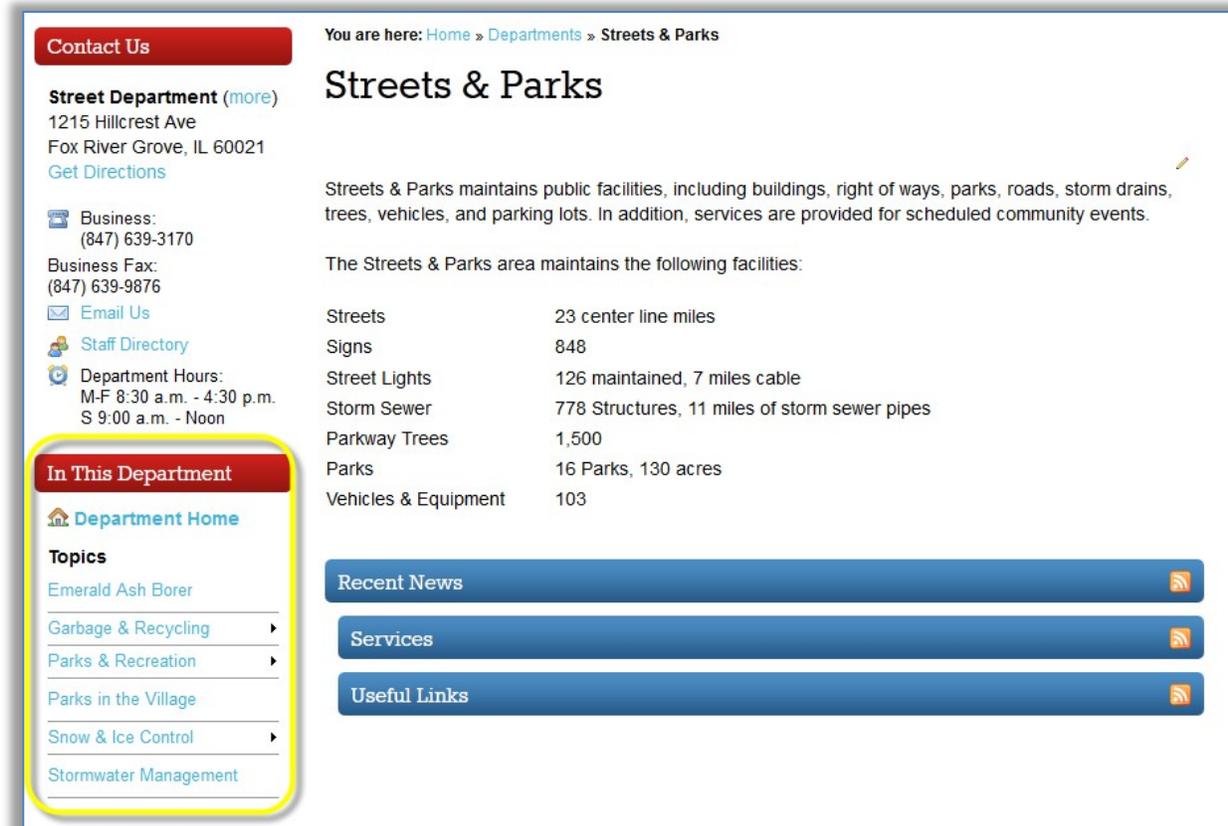


### TOPICS & SUBTOPICS

Topics & Subtopics enable you to create and organize sections for your website. Topics can be associated to multiple Departments and Divisions.

Subtopics can be created for a Topic and are generally implemented as “fly-out” navigation within a list of Related Topics. See the screenshot above for an example listing of Topics with flyouts to related Subtopics.

Within your website, Topics are generally displayed to either the **left or the right** of your website content. See the yellow highlighted box in the screenshot below for a typical example of Topics layout.



## DIVISIONS

A **Division** must be associated to one and only one **Department**. A **Board/Commission** is a special type of Division that is usually configured with special editable areas that list Events, Agendas & Minutes.

- **Boards Listing URL:** [www.yourwebsitedomain.com/boards](http://www.yourwebsitedomain.com/boards)

## FROM FRONT-END EDIT

The Quick Edit Pencil enables you to make updates to your Department without using the eGov Manager interface. You must be logged into the eGov Manager – then navigate to your Topic, Subtopic or Division page and look for the Description area and the Quick Edit Pencil.

Other types of updates – like contact information or changing the title of your Topic, Subtopic or Division – require that you use the eGov Manager interface.

## FROM EGOV MANAGER

Topic, Subtopic and Division pages can be found under the “Structure” title in the left-hand navigation. When you select **Modify** for an item, you will see a list of all of the Topics, Subtopics or Divisions that you are authorized to edit – a Webmaster or Project Manager will see ALL elements configured within the website. Note that you can use the “**Department**” or “**Name**” filter to limit the items shown.

### Configuring Divisions

The following tabs enable you to configure specific content for your Division page. Key tabs for managing your website via the **Add/Modify Division** functions in the eGov Manager include the following:

- **GENERAL TAB** – Set associated department, type, name and contact information;
- **DESCRIPTION TAB** – Add or update the description for your Division or Board;
- **STAFF DIRECTORY TAB** – Associate users to be included in this Division’s Staff Directory; and
- **USER ACCESS TAB** - Associate users to have access to this Division.

Note: *When you add a Division, the system automatically defaults to give all users within your control with access to this Division. Use the User Access tab’s << arrows to remove access for all users.*

### Configuring Topics & Subtopics

The tabs enable you to configure specific content for your Topic and Subtopic pages. Key tabs for managing your website include the following:

- **GENERAL TAB** – Set associated department, type, name and contact information;
- **DESCRIPTION TAB** – Add or update the description for your Division or Board;
- **SUBTOPICS TAB** – Associate users to be included in this Division’s Staff Directory; and
- **DEPARTMENT ACCESS TAB** - Associate the Departments & Divisions where this item will appear.

## Lesson 5.1 – Add a New Board/Commission

1. Login to the eGov Manager
2. In the **Public View** browser tab, navigate to the Department where you want to add the Division
3. Find the “In this Department” section, choose the Quick Edit box and hit “Add Division”
4. Find the active **eGov Manager** browser tab

5. **General Tab**, complete at least the following fields:
  - a. Select **Type** = Boards/Commissions – this shows Events, Meeting Agendas & Minutes  
Add **Name** of Division
6. **Description Tab**
  - a. Add a **Description** for this Division
7. Hit **SAVE & CONTINUE**

## Lesson 5.2 – Add Topics & Subtopics to Your Department

1. Login to the eGov Manager
2. In the **Public View** browser tab, navigate to the Department where you want to add the Topic
3. Find the “In this Department” section, choose the Quick Edit box and hit “Add Topic”
4. Find the active **eGov Manager** browser tab
5. **General Tab** – complete at least the following fields:
  - a. Select a **Topic Type** – generally this will be ‘Default’
  - b. Add **Name** of the Topic
6. **Description Tab**
  - a. Add a **Description** for this Topic
7. **Department Access Tab**
8. HIT **SAVE & CONTINUE** and then re-edit the Topic
9. **Subtopics Tab**
  - a. Add any Subtopics – similar to the process for adding Topics
10. HIT **SAVE & CONTINUE**

### VIDEO TUTORIAL:

*For additional assistance on managing Topics & Subtopics, look for the “Using Topics & Divisions” video in the Managing Department Videos section. You can find all of our videos under “Assistance” and “eGov Manager Help” – look for the Video Tutorials section.*

## CHAPTER 6 – ADDING DOCUMENTS

Documents within your website appear in two places of your website – within pages like Departments, Divisions, Topics & Categories via Content Windows and in the Document Center.

**Document Center URL:** [www.yourwebsiteaddress.com/egov/apps/document/center.egov](http://www.yourwebsiteaddress.com/egov/apps/document/center.egov)

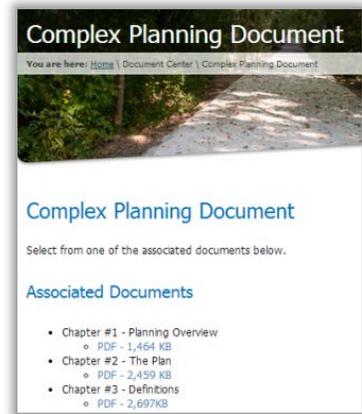
### ADDING DOCUMENTS

Documents can be added to your website in one of four ways. They are as follows:

- **Create** – either edit within the eGov Manager WYSIWYG Editor or cut-and-paste from a document to create your document. This is common for news and notices or for informational pages.
- **Upload** – upload a document (e.g. generally recommends PDF format). This is common for adding downloadable forms & applications, agendas & minutes and/or ordinances.

- **Link** – link to an existing website. This is common for linking to an article or content available from another partner website – e.g. linking to a state website for information.
- **Create / w/ Associated Documents** – can be a combination of create, upload and/or link. This is common for creating planning documents and more complex documents that require chapters and multiple documents.

See Lesson YYYY for specific instructions on creating a complex document – an example is listed to the right.



## FROM FRONT-END EDIT

Documents are usually configured on **Department, Division, Topic & Category** pages within your website via **Content Windows** for one of four document types: **News & Notices, Meeting Agendas, Meeting Minutes** and **Related Pages** (may also be called Related Links, Additional Info, etc.). Generally, Related Pages content windows are used to display non-news items like forms and applications, planning documents and more.

In the screenshot below, Content Windows for documents are: **Recent News & Useful Links.**

**Streets & Parks**

Streets & Parks maintains public facilities, including buildings, right of ways, parks, roads, storm drains, trees, vehicles, and parking lots. In addition, services are provided for scheduled community events.

The Streets & Parks area maintains the following facilities:

Streets	23 center line miles
Signs	848
Street Lights	126 maintained, 7 miles cable
Storm Sewer	778 Structures, 11 miles of storm sewer pipes
Parkway Trees	1,500
Parks	16 Parks, 130 acres
Vehicles & Equipment	103

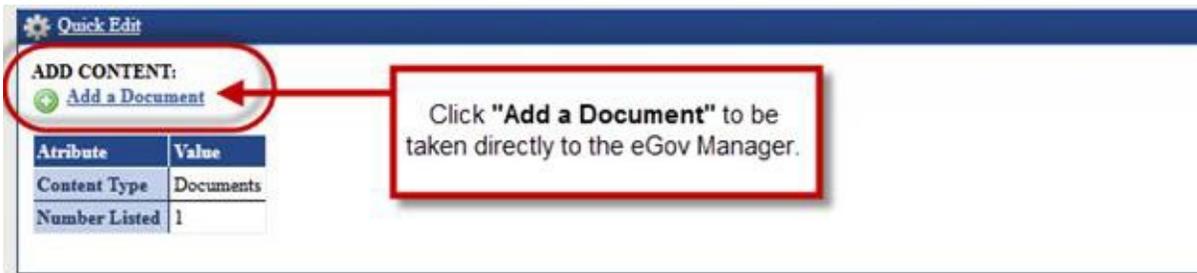
**Recent News**

**Services**

**Useful Links**

Now that you have clicked **Quick Edit**, you can now select the **Add a Document** link (circled in red with an

arrow pointing to it in the screenshot below) – and you will be taken directly into the eGov Manager to the **Add Document** page.



## FROM EGOV MANAGER

### Adding Documents using Create, Upload or Link

The most important first step in adding a document is to determine how you are going to add it to your website. Look for the **Document Format** type within the **General** tab of the **Document Center** application (see the yellow highlighted section in the screenshot below):

**CREATE** – Complete the **HTML tab** by adding content into the Description area. Note that you can also upload “Associated Documents” in the Documents tab and these will appear below the text that you put in the Description area (e.g. for a related form);

**UPLOAD** – Complete the

**Documents tab** by uploading a document. Note that you can upload additional documents here, but these are for different versions of the same document (e.g. an Excel version and a PDF version of a form); and

**LINK** – No other tabs are required to complete except the General tab. You will be required to provide a URL. When this document is selected on your website, it will open that URL.

**CREATE with ASSOCIATED DOCS** – Choose **Create for the Document Format** and add a basic introduction to the document in the HTML tab and add associated documents in the Documents tab.

## CLASSIFYING THE DOCUMENT

You must classify this document in order to get it to appear on the page (or pages) where you would like it to appear. Follow these steps:

The screenshot shows the 'Document Center' 'Add Document' page. The 'General' tab is selected. The 'Document Format' field is highlighted in yellow and shows radio buttons for 'Create', 'Upload', and 'Link', with 'Create' selected. Other fields include 'Item Name', 'Status' (Active/Inactive), 'Featured' (Yes/No), 'Include In List' (Yes/No), 'Official Date' (Mar 11, 2013), and 'Show Official Date' (Yes/No). There are 'Remove' and 'Add New' buttons for the contact field.

- Under **Classification** on the **General** tab, select the specific department in which you want the document to appear;
- Select any **Topics** or **Subtopics** where you would like this document to appear; **and**
- Select the appropriate **Document Type** – in this case, “News” is selected.

**Classification**

Keywords

**Departments / Divisions** \*

- Airport
- Board of Aviation
- Assessor
- Auditor
- CASA
- Clerk
- Commissioner
- ...

**Categories / Subcategories**  ← Click "Edit List" to expand the options, if necessary.

No Items Selected

**Topics / Subtopics**  ← Click "Edit List" to expand the options, if necessary.

No Items Selected

**Document Types** \*  Agendas & Minutes  Breaking News  Forms & Applications  News  Useful Links

*Please note this is a sample screenshot that provides an overview of the Classification section; Department listings are not the same for all clients.*

Note that you can always tell the Document Type from the heading that is listed immediately below the **Quick Edit** box in Front-End Edit.

## Lesson 6.1 – Add a News Release

1. Login to the eGov Manager
2. In the **Public View** browser tab, navigate to the page where you want to add the News Release
3. Look for the **Content Window** for “News”. Choose the **Quick Edit** box above this content window and hit “Add Document”
4. Switch to the **eGov Manager** browser tab (which has either opened or refreshed)
5. **General Tab** – complete at least the following fields:

- a. **Item Name** is the name of the Document
  - b. **Official Date** will be used in ordering this document in the Content Window listing and in the Document Center
  - c. Set the **Classification**
  - d. Set the **Document Type = 'News'**
6. **HTML Tab**
- a. Select **Page & Document Templates** (generally default values are used)
  - b. Either use the **Edit-Paste** function to copy in content or **add text directly in the Editor**
7. **HIT SAVE & CONTINUE**
8. In the **Public View**, refresh the page to verify that the item appears in the **News** content window

## Lesson 6.2 – Upload a Form / Application

1. Login to the eGov Manager
2. In the **Public View** browser tab, navigate to the page where you want to add the News Release
3. Look for the **Content Window** for **"Related Pages"**. Choose the **Quick Edit** box above this content window and hit **"Add Document"**. *Note – the "non-news item" content window could be called "More Information" or "Related Links" or "Useful Links" in your specific implementation.*
4. Switch to the **eGov Manager** browser tab (which has either opened or refreshed)
5. **General Tab** – complete at least the following fields:
  - a. **Item Name** is the name of the Document
  - b. **Official Date** will be used in ordering this document in the Content Window listing and in the Document Center
  - c. Set the **Classification**
  - d. Set the **Document Type = 'Related Pages'** (it should be the same title from Quick Edit box)
6. **Documents Tab**
  - a. Select **Add Section**
  - b. Provide a **Section Title** e.g. Building Permit Form
  - c. Upload the PDF Document
  - d. Add a **Document Title** e.g. 2014 Form 1-A (pdf)
  - e. Add a **Short Description** (not required – e.g. Submit to Building Department)
7. **HIT SAVE & CONTINUE**
8. In the **Public View**, refresh the page to verify the item appears in the **Related Pages** content window

## Lesson 6.3 – Add a Complex Document

1. Login to the eGov Manager
2. In the **Public View** browser tab, navigate to the page where you want to add the News Release
3. Look for the **Content Window** for **"Related Pages"**. Choose the **Quick Edit** box above this content window and hit **"Add Document"**.
4. Switch to the **eGov Manager** browser tab (which has either opened or refreshed)
5. **General Tab** – complete at least the following fields:
  - a. **Item Name** is the name of the Document
  - b. **Official Date** will be used in ordering this document in the Content Window listing and in the Document Center
  - c. Set the **Classification**
  - d. Set the **Document Type = 'News'** (it should be the same title from the Quick Edit box)

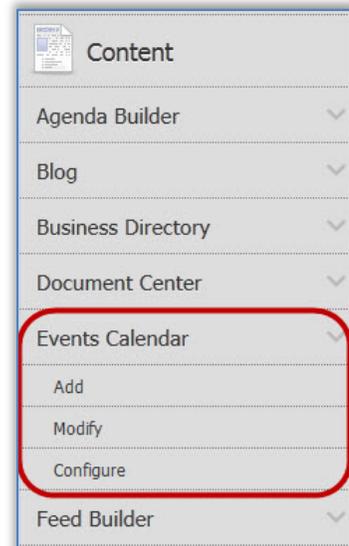
6. **HTML Tab**
  - a. Select **Page & Document Templates** (generally default values are used)
  - b. Type a short introduction to the document in the HTML Editor – e.g. *The following documents represent the Comprehensive Plan for the City 2012 – 2018.*
7. **Documents Tab**
  - a. Select **Add Section**
  - b. Provide a **Section Title** e.g. Chapter 1
  - c. Upload a PDF Document
  - d. Add a **Document Title** e.g. Introduction
  - e. Hit **Continue** - Hit **Continue & Add Another**
  - f. Upload a PDF Document
  - g. Add a **Document Title** e.g. Table of Contents
  - h. Hit **Continue** - Hit **Continue** to Save
8. **HIT SAVE & CONTINUE**
9. In the **Public View**, refresh the page to verify that the item appears in the **Related Pages** content window

## CHAPTER 7 – ADDING EVENTS

Events appear on the website within the Events Calendar and on certain pages via Content Windows (e.g. on Board & Commission pages). Events can be added to your website's Events Calendar only through the eGov Manager. Look for "**Content**" and then "**Events Calendar**" in the left-hand navigation.

To add an event, you will need to complete the following sections in the **GENERAL TAB** of the Events Calendar:

- **Item Name:** the name of the event;
- **Time:** the time of the event. You can add recurring events within this section if you'd like;
- **Classification:** associate this event to the Home Page, Topic & Subtopic pages and it will appear within a content window within those pages. Note: *A Category is not required and is not needed.*



**Events Calendar URL:** [www.yourwebsiteaddress.com/egov/apps/events/calendar.egov](http://www.yourwebsiteaddress.com/egov/apps/events/calendar.egov)

### TIME & RECURRENCE

For each event that you create in the eGov Manager, a user will need to provide the Start Date & Time and an End Date & Time. The system has been optimized for government websites in a couple of ways:

- Ability to not set an End Time – e.g. for Board Meetings that do not have a definite end time; and
- Ability to set multiple recurring events – e.g. for meetings that recur twice within a month;

A user can set the recurrence pattern by choosing an option (other than Once) in the Recurrence area under Time. Upon selecting an option, the screen will expand with the options listed below:

## Time

Schedule

\* **Start Date & Time** \*   Clear

**End Time Type** \*  Set end time  No specific end time  All day event

\* **End Date & Time** \*   Clear

**Recurrence** \*  Once  Daily  Weekly  Monthly  Annually

\* **Ends After** \*  5 occurrences  
 End date

\* **Pattern** \*  Day 1 of every 1 months.  
 The First Monday of every 1 month(s)

## CLASSIFICATION

The following screenshot illustrates how this specific type of content can be associated to Departments, Categories (usually done by the Webmaster) and Topics/Subtopics. A user is required to also set an Event Type (these can be configured by the Webmaster using the Events Calendar Configure function).

### Classification

**Keywords**

**Departments / Divisions** \*

**Categories / Subcategories**

**Topics / Subtopics**

**Event Types** \*

Default  Meetings

*Selecting the Event Type is required.*

*You must select a department to create the event. Click "Edit List" to select the department.*

*Click "Edit List" to expand the options, if necessary.*

*Click "Edit List" to expand the options, if necessary.*

## Lesson 7.1 – Add a Recurring Event

1. Login to the eGov Manager

2. In the left-hand navigation of the **eGov Manager**, select **Events Calendar** under **Content** in the left-hand navigation
3. Choose **Add** to add an event
4. **General Tab** - complete at least the following fields:
  - a. Put name of the event in **Item Name**
  - b. Under **Start Date & Time**, put the date for the next meeting
  - c. Set the **End Date & Time** for the next meeting (generally, the same day)
  - d. Click **“Monthly”** under **Recurrence**
  - e. Set the number of times for this recurrence or an end date
  - f. Select the **Pattern** based on the descriptions provided
  - g. Select **ADD**

**Repeat steps a-g**

  - h. Set the Classification so the Event is associated to the Departments, Divisions & Topics of interest
5. **Description Tab**
  - a. Provide a description for this Event.
6. Hit **SAVE & CONTINUE**

## CHAPTER 8 – ADDING SERVICES

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 a Content Window that lists services related to the Department, Division or Topic. Services 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:** [www.yourwebsiteaddress.com/egov/apps/services/index.egov](http://www.yourwebsiteaddress.com/egov/apps/services/index.egov)

### USING THE URL FIELD

The URL field within the GENERAL TAB enables you to create the Service so that it immediately jumps to the location of the URL when this Service appears either on a page within your website or in the Services Directory. If you want to provide a description and then a link, add the Description and link in the DESCRIPTION TAB.

### Lesson 8.1 – Create a Service for an Online Form

*Enable constituents to find your online forms more easily by incorporating them into Department, Division, Topic or Category pages by creating a service. The online form will also then appear in your website’s Services Directory – usually linked from the /tools page.*

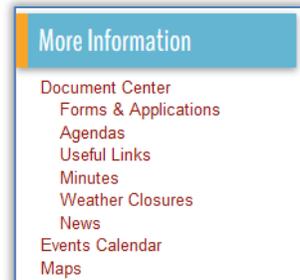
1. Find the form by going to the Action Center landing page
2. Cut-and-paste the URL to the clipboard by selecting it and using CTRL-C
3. Login to the **eGov Manager**
4. In the **Public View** browser tab, navigate to the Department where you want to add the Service
5. Choose the **Quick Edit** box and hit **“Add a New Service”**
6. Switch to the **eGov Manager** browser tab (which has either opened or refreshed)
7. **General Tab**
  - a. Select a **Service Type**
  - b. Add the **Name of the Service** (e.g. Pothole Report Online Form)

- c. Go to the **URL field** and paste (CTRL-V) the form URL into this area
- d. Classify this Service to a Department/Division, Topics & Subtopics
- e. Hit **SAVE & CONTINUE**

## CHAPTER 9 – ADDING OTHER CONTENT TYPES

Additional items under “**Content**” are added similar to the process used to add Events and Services. Items will appear within your website in two areas:

- Within the Content’s landing page that’s accessible via: [www.yourwebsiteaddress.com/tools](http://www.yourwebsiteaddress.com/tools)
- Linked from the “**More Information**” section within Department, Division, Topic, Subtopic and Category pages. Links here go to the same landing pages listed under “Tools” – but the items are filtered by the Department, Division, Topic or Category from which it is linked.



## CHAPTER 10 – USING IMAGES WITHIN CONTENT

Visit the **Assistance – eGov Manager Help – User Guide – Quick Reference Guides** in the eGov Manager to access a User Guide developed specifically for **Adding Images**.

### RESIZING PHOTOS WITH PAINT.NET

**Paint.NET** ([www.PAINT.NET](http://www.PAINT.NET)) is a free image manipulation program. It features an intuitive and innovative user interface with support for layers, unlimited undo, special effects, and a wide variety of useful and powerful tools. **Paint.NET** can accomplish many of the tasks performed by other commercial image editing software and more.

In general, you will want images to be no wider than 500 pixels wide for your website. You can resize images by opening them in PAINT.NET and using the **Image – Resize** feature.

## CHAPTER 11 – INTERACTIVE SERVICES | ACTION CENTER

The Action Center enables website users to create online forms that can be submitted via either a web form or a mobile device. A powerful work-order management system enables both staff members and the submitter to track the progress of a specific report as it goes from **open** to **reviewed** to **resolved**.

### CREATING & MODIFYING ACTION CENTER ITEMS

Action Center items cannot be managed via Front-End Edit. You can find these under the “Services” heading within the left-hand navigation of the eGov Manager.

## ACTION CENTER DASHBOARD

Elements of the Action Center include the following:

**General** – General information about the Action Item (name, available to public (for over-the-counter Actions), status, test mode), automatic activation and expiration, access rights and classification settings (e.g. department/division associations).

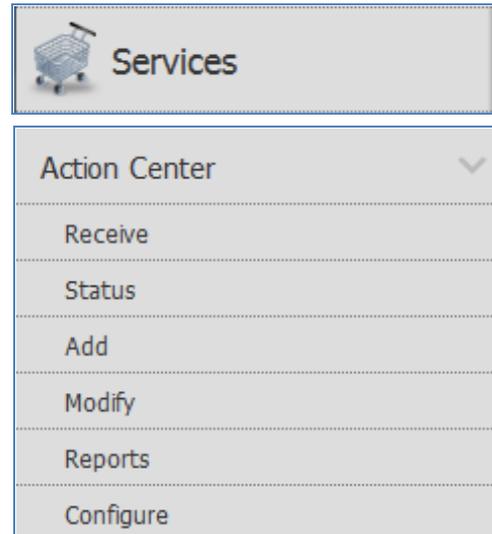
**Form Fields** – Configure all of the fields that users will need to complete when completing or taking an Action. Fields can be configured in a range of ways – from one-line text boxes to multi-select drop-down menus. A few new options enable you to add spacers and clickable images. Fields can also now be configured to be searchable within the eGov Manager.

**Confirmation** – Set the Confirmation messages (confirmation and service norm) that will be completed when a user submits an Action Item.

**Integration** – Users with Webmaster-level access can configure settings that enable the Action Item to pull from existing data or write to existing databases via an API.

**Workflow** – Users with advanced access can associate workflow items, set Shipping requirements and deliver a document upon Action if needed;

**User Access** – Configure access for users to the Action Item.



## ACTION CENTER: STATUS

You can view all online forms that have been submitted by using the Action Center Status area. Key features within this section include:

- Ability to Filter by various Action Center Items;
- Ability to search by Name of Submitter;
- Ability to use the "Download Report" option to download all submitted items to Excel; and
- Ability to update the status of a submitted Action Center Item;

### VIDEO TUTORIAL:

*For additional assistance on Action Center functionality, look for the "Action Center" videos within the Online Services Videos section. You can find all of our videos under "Assistance" and "eGov Manager Help" – look for the Video Tutorials section.*

## Lesson 11.1 – Submit & Track an Action Center Item

**Note:** *It may be desirable to copy an existing Action Center form in order to ensure your test data does not get confused with real submittals from constituents. To copy an Action Center form, simply choose "Modify" under Services - Action Center and choose copy in front of the form to be copied. Note that by default, a copied form is INACTIVE and you will need to make it ACTIVE if you would desire to submit items from the Public View side.*

1. Submit an Action Item (either from the Public View or login and use "Receive" function)

2. Under Email Address in the form, put an email address that you have access to so you can review the confirmation message generated by the system.
3. Login to the **eGov Manager**
4. In the left-hand navigation, choose **Services - Action Center**
5. Next, choose **Status** to review your submitted items
6. Choose **Update** in order to change the status.
7. Review the submitted data under the appropriate tab.
8. Change the **Status** of the item to **Resolved**.
9. Click to indicate that you want to send an email to the Submitter.
10. Add a message in the **Email Submitter** box.
11. Login to your email account to verify that you received a confirmation message.

*Note: If you do not see your submitted item when you choose Status, you may need to set yourself up so that you have the authority to View Submitted Items. If this is the case, follow these steps:*

1. In the left-hand navigation, choose **Services - Action Center**
2. Next, choose **Modify** to see a list of forms that you can modify
3. **Edit** the appropriate form
4. **User Access Tab**
  - a. Choose **Add**
  - b. Put your name in the **User** box
  - c. Your name will appear below the box in **BLUE** – select it
  - d. Check **View Submissions** and **Fulfill Workflow**
  - e. Hit **Add**
5. Hit **SAVE & CONTINUE**

## LESSON 11.2 – View a List of Work Items

*Within the **Item Report** under **Action Center – Reports** in the left-hand navigation, you can set a field to show in the Work list. You must filter by the item and fields must be configured to appear in the Report. The Report then looks like this:*

The screenshot shows the 'Action Items' report interface. At the top, there are search criteria including 'Date Range' (Today, Yesterday, This Month, This Year, Last Month, Last Year, Since Last Login, Custom) and 'Scale' (Year, Quarter, Month, Week, Day). Below this are input fields for 'Receipt #', 'UserRef1', 'First Name', 'Last Name', and 'Email'. A dropdown menu for 'Item' is set to 'Barking Dog'. There are also checkboxes for 'Source' status: Open (checked), Closed, and Archived. Action buttons include 'Return to Report Listing', 'Map Report', 'Graph Report', 'Download Short Report', 'Download Report', and 'Run Report'.

The report title is 'Action Items 1-8 of 8' and the specific report is titled 'Barking Dog'. Below the title is a table with the following data:

Details	Item Title	Submitted On	Status Step	Last Updated By	Tracking #	Full Name	Your Email	Complaint	Address of Dog
<a href="#">Details</a>	Barking Dog	2013-04-24 17:22:11	Open Submitted	2013-04-24 17:22:11 Kathy Arnett	2013-NJBBT4	Kathy Arnett	karnett@egovstrategies.com	Big dog barking at the fence.	233 S McCreia St Indianapolis IN 46225
<a href="#">Details</a>	Barking Dog	2013-04-22 10:22:05	Open Submitted	2013-04-22 10:22:05 Default User	2013-2ZCUFI	Lawrence Ballenger	lballenger@gmail.com	Shut it down	111 Glenwood Ln Fishers IN 46038

Here's how you configure the **Item Report** as a **Work List**:

1. In the left-hand navigation, choose **Services - Action Center**
2. Next, choose **Modify** to see a list of forms that you can modify
3. **Edit** the appropriate form
4. **Fields Tab**
  - a. Edit the Field whose values you would like to see appear in the Report
  - b. Set the "**Show in Lists**" value to **YES**
5. Hit **SAVE & CONTINUE**
  
6. Submit a sample form if no items have been submitted
7. In the left-hand navigation, choose **Services - Action Center**
8. Next, choose **Reports** to see a list of reports
9. Select **Item Report**
10. Select a value for **Item** in the drop-down menu – this will filter the Items by that **Action Item**
11. Hit **Run Report**.
12. Additional fields (including the field you modified) will now appear in the Report (generally listed to the right of the **Tracking** column)

#### VIDEO TUTORIAL:

*For additional assistance, look for the video "Lesson 5 – Action Center for Online Forms". You can find all of our videos under "Assistance" and "eGov Manager Help" – look for the Video Tutorials section.*

## CHAPTER 12 – INTERACTIVE SERVICES | MAP VIEWER

Visit the **Assistance – eGov Manager Help – User Guide – Comprehensive Training Manual** in the eGov Manager to access instructions on using the eGov **Map Viewer**.

- See section entitled **Map Builder** in the "**Content**" section.

## CHAPTER 13 – INTERACTIVE SERVICES | E-NOTIFY & ALERTS

Contact eGov Strategies at [support@egovstrategies.com](mailto:support@egovstrategies.com) to get a customized version of our User Guide developed specifically for using E-Notify.

You can also visit the **Assistance – eGov Manager Help – User Guide – Quick Reference Guides** in the eGov Manager to access instructions on publishing **Social Media & Alerts**.

## CHAPTER 14 – INTERACTIVE SERVICES | AGENDA BUILDER

Visit the **Assistance – eGov Manager Help – User Guide – Quick Reference Guides** in the eGov Manager to access a User Guide developed specifically for the **Agenda Builder**.

#### VIDEO TUTORIAL:

*For additional assistance, look for the video "Lesson 7 – Agenda Builder". You can find all of our videos under "Assistance" and "eGov Manager Help" – look for the Video Tutorials section.*

## CHAPTER 15 – INTERACTIVE SERVICES | NAVIGATION BUILDER

Visit the **Assistance – eGov Manager Help – User Guide – Quick Reference Guides** in the eGov Manager to access a User Guide developed specifically for **Navigation Builder**.