PivotCMS™
Powerful & Pragmatic Website Management

Website Editor’s Guide

PivotCMS is a hosted service of XeniumGroup

Revised April 14, 2003
Introduction

What is PivotCMS?
PivotCMS is a website management service for organizations and departments with large or frequently-changing websites. PivotCMS has been in production and used by over one hundred content editors, web developers, graphic designers and website administrators since 1999.

PivotCMS helps content editors and web developers collaborate to build and maintain large, easy-to-use websites. Marketing professionals like Pivot because it helps enforce the “brand identity” and maintain a consistent look and feel. Executives and managers like Pivot because it provides a secure environment that implements organization policies about who is responsible for what.

PivotCMS is offered as a hosted service so there is no hardware to buy or set up, no software to install or configure, and no maintenance required in the future. Pivot supplies Internet bandwidth, database backups and continued software development so you can focus on your content.

How does PivotCMS work?
PivotCMS is a sophisticated database-backed web application that you use to update your public website. You publish pages from this web application to your public website whenever you want, from wherever you want.

Your public website can be hosted anywhere – in-house or by any hosting company, on a shared virtual server or a dedicated machine.

We’ve automated the FTP upload process so there’s nothing to learn, and there’s no way for you to make a technical error in an unfamiliar program. All you have to do is press the “Publish” button and you’re all set.
Editing your website in Pivot has four easy steps:

1. Log into the Pivot server.
2. Edit your web page content, upload new templates, change your publishing configuration, etc.
3. See a dynamic preview of the changes you make instantly, and keep making changes until you're satisfied with the result.
4. Publish your pages instantly to the public website.

**Pivot for information architecture**

Information architecture refers to the structural aspect of a website – it's responsible for ease of use, friendly navigation and overall visitor experience. With a well-developed information architecture, you can change the visual look of a website (through graphic design) while easily retaining the underlying structure, in the same way that you can paint your house without replacing the foundation.

Pivot supports strong information architecture by providing an outline view of your website and supporting operations that act on pages and groups of pages (called sections) structurally. For instance, Pivot allows you to move documents and sections into new sections without breaking any links.

**Pivot for graphic design**

Graphic design creates the visual look of a website, creating the visual brand and providing the environment that people enter when they visit the website. Graphic design is what people typically think of when they think of using the web, but it doesn't have much to do with ease of use, navigation or the content hierarchy. Pivot doesn't care if the masthead is red or blue, all it knows is that there is a masthead there.

PivotCMS supports graphic designers in several ways. One important way is by implementing visual templates. A template is a graphic design “shell” that is used on multiple pages. For instance, each section may have a template that uses photography, headlines, navigation or testimonial quotes to distinguish this one section from any other section. The template is used on every page in a given section, providing a consistent look and allowing the website visitor to keep track of where they are in the spatial environment of the web.

Templates are very powerful because you can make design changes to hundreds of pages instantly. For instance, you can apply an entirely new design, via a template, to the entire site or to a few sections of the site, in one operation.

Templates also prevent errors in design. The web is a complicated, technical area of development. A single typographic error can break an entire site. By using templates to separate design from content non-technical people can update their content without worrying that one wrong move will break something. It’s much harder to break your website using Pivot.

**Pivot permissions scheme**

PivotCMS has a powerful, enterprise-class permission scheme so that you can lock users into, or out of, specific pages or sections of the site.

- **Users have Roles.** Each user is assigned a role based on their level of technical expertise and range of responsibility. As their expertise or responsibility grows their roles can easily be expanded.

- **Roles have Capabilities.** Each role has certain operations that it is allowed to perform. For instance, a section manager can create new documents but cannot change the configuration variables of the site.

- **Documents have permissions.** Users are assigned to individual documents, and they can operate on those
documents to the degree with which their role allows. For example, someone with editor permissions but no document assignments cannot do anything. They must be assigned permissions to one or more documents. Once that permission is assigned, they can operate on that document within the range of their role. Staying with the editor example, they could edit and publish the document they have permission on, but they could not move that document to a new section.

Permissions are usually transparent to the end-user, until one day they want to add a document or delete a document, and Pivot prevents this operation. If this happens and you feel you should have permissions over a new set of documents, or expanded capabilities, talk with your site administrator.

QuickStart

Login/Logout
To Login to Pivot, go to the URL issued when you signed up for Pivot. Usually it looks something like this:

http://pivot.xeniumgroup.com/YourCompanyName/

When you arrive, you should see the following screen:

Fill in your username and password, and click “Login.”
After you login, you will arrive at the Home screen. The home page is a handy quick reference. Some people won’t use PivotCMS every day; this is a helpful spot to get reoriented.
Notice the menu bar in the upper right area of every screen. You can return to the home page by clicking the “Home” link.

When you are done using Pivot you should logout for security. Click the “Logout” link on the right side of the menu bar. If you forget to logout Pivot automatically does it for you after a short while. This prevents someone from accidentally making changes to your website at your computer.

MyPages
The My Pages link from the menu will display all of the website pages that you are allowed to edit, from across all sections of the site. This is a convenient starting point for your everyday work. From the My Pages screen you can preview, edit, publish and administer your web pages. You can also change your password by clicking the link in the upper right corner of the screen.

Browse
The Browse link in the menu provides an outline view of your entire website. Even if you don’t have permission to edit a page, you can browse it here. Browse initially shows only the sections, or directories, of your website.

To expand the view of a section, just click on the section label and you will see a “browse tree” of that section, including its sub-sections and pages.
The browse screen has several important elements. Reading left to right across a document line:

- The document moniker, for instance “index.html,” shows the file name on the server. You can click this link to see a dynamic preview of the page.

- The document ID number, for instance (2), is in parentheses right after the document name. This number is the “URL” you will link to when you create hyperlinks.

- If you have the appropriate permissions, you will see the “edit - publish - admin” links. Edit allows you to change a document’s content; publish allows you to render the page and load it onto the webserver where the public can view it; admin provides for administrative functions like renaming documents, moving documents and sections, and setting permissions on documents.

- Next you’ll see the document name, which is a “human-readable” name. It is longer than the moniker because it isn’t used as the file name. This is helpful when maintaining a large website.

- You will also see a “last-modified” date – the date on which the page was last edited.

- Finally, you may see a contact person. Documents can be assigned to people responsible for the content, so that other people using Pivot know who to call for questions or comments about that document.
Editing documents
Clicking on any “edit” link will bring you to the document edit screen. This is the area where you work to change the document content, status, template or format of the document.

- In the upper left corner you see navigation “bread-crumbs” – this is a hierarchical path of where the document “lives.” If you click on a section name it will take you to the browse tree for that section. If you click on the document name (the .html name) you will see a preview of the document.
  - The “Submit and preview document” is what you click after you have made your edits. Pivot updates the database and instantly creates a dynamic preview for your review. No one can see your edits until you publish the page to the webserver, so you can take your time and continue to make the changes you want until you’re satisfied.
  - The Status of the document can be “approved,” “unapproved” or “draft.” See details below.
  - The Template menu allows you to select which template is applied to the document. Typically each section of a website has one or more templates and you should choose the one appropriate for that section. More complex sites will have more advanced template schemes. Check with the site administrator or graphic designer if you are unsure which template to use.
  - The Format of the document is either Text or HTML. Text formatting is simpler to use, and easier for non-technical people to maintain. HTML formatting is for power-users. Think carefully before you jump into HTML formatting. If more than one person maintains the web page, make sure everyone is capable of manually editing HTML before choosing this format. For most business documents Text formatting is the way to go. We discuss the details of each format below.
  - The title is the name that shows up in the browser title bar. It is also used by search engines when displaying results. Choose a concise title that describes the page...
and don’t use too many words unless you have a specific reason for doing so.

• The headline is a field that typically displays in a larger or bolder font. It is often the same as the title of the page, but not always, which is why you have the choice. Note: the headline will only show up if the designer has specified where to display the headline in the template.

• The content block is the main body of the document. Whatever you type or paste in here will show up where the designer has specified in the template. This is typically the central section of a web page.

• The Notes field does not publish, but is a useful place to paste a code or content fragment you might need later, or a place to leave notes for your colleagues to check on a detail or comment on a photo. It is a general-purpose field that you might use in many ways.

• Pivot displays the last modified and last published dates for the document, as well as the contact person that has been assigned.

• You will also see a list of any images associated with the document, and you can add images to the document by clicking on the Add images link.

Document status
Here are some things to keep in mind about document status:
• Approved documents are either published on the public website or are ready to be published.

• Unapproved documents will not be published to the public website. Typically a document is unapproved because an editor has changed the document content but they do not have permission to publish the document. In this case, when the editor makes changes, Pivot automatically sets the status to unapproved and the editor cannot change it back. The editor can continue to make document edits but they will not show up on the public website until someone with additional permissions reviews the document, sets the status to approved and then publishes the document.

• Draft documents are handy if you do have publish permission but want to work on a document over a period of time or show it to colleagues without publishing it to the public website. If you set the status to Draft and the “Submit and preview” the document, you will see a Revert button when you return to the edit screen:

If you click the Revert button it throws away your changes and brings you back to the last-published content on the public webserver.

Draft documents do not publish to the public website.
Adding document images
Clicking the add an image link brings up the image wizard:

- The image type must be either gif or jpeg (jpg) to be viewed on the web.
- Click Choose File to browse and navigate your local hard drive to find the image you want to load.
- Assign the image a moniker. This is the way you will refer to the image in your document layout. The moniker might be the same as the filename of the image or some other shorter or easier to use name.
- Click Add Image to load the image from your hard drive to the Pivot server.

In the document content block, add the image to the layout by typing:

```
<img src="moniker">
```

Then submit and preview your document. The quotes are required. Moniker is the name you gave the image when you added it using the wizard.

Of course, there are many formatting options you may want for your images. While beyond the scope of this guide, here are some typical cases to get you started:

- `<img src="moniker" border="0">` Turns off the blue border around the image. Alternately, set the border to 20 and get a 20 pixel blue frame around the image.
- `<img src="moniker" align="right">` Aligns the image to right side of the content block. Possible align values are left, center, right.
- `<img src="moniker" hspace="10" vspace="10">` Adds 10 pixels of blank space to the horizontal and vertical edges of the image. You can use one or the other or both.
- `<img src="moniker" alt="Put the title of the image here">` The alt tag displays text when the browser has images turned off. It also allows text-to-speech screen readers to speak the alt tag, helping visually-impaired people use the website.
- You can use multiple image attributes in one tag: `<img src="moniker" border="0" align="right" hspace="10" vspace="10" alt="Put the title of the image here">`
Linking to another document
Linking to both internal or external documents is done simply using the hypertext reference tag, like this:

\[ <a href="LinkDestination">Click here</a> \]

You must use the quotes, and this tag is finicky about the brackets and the space after the “a”. If you forget to type the “</a>” then everything after “Click here” will also be linked. The “</a>” says “end of link.”

Internal links
When linking to other documents inside the Pivot system, you must link to the document ID number, like this:

\[ <a href="22">Click here</a> \]

By linking to the document ID number, you will never have broken links. Even if you move the document or change its name, the link will still work.

External links
When linking to documents on the web, you must type or copy/paste a fully qualified URL for the link, like this:

\[ <a href="http://www.yahoo.com">Click here to go to Yahoo</a> \]

The best way to avoid typographic errors is to open a second browser window, go to the page you want to link to, and copy the page location URL. Then switch back to Pivot and paste the URL into the “href” tag.

Basic text formatting
The basic text format supports several basic styles.

**Bold text**
Use the `<b>` and `</b>` tags, like this:

- This is `<b>bold</b>` text.

  to generate:

  This is **bold** text.

**Italic text**
Similar to bold, use the `<i>` and `</i>` tags, like this:

- This is `<i>italic</i>` text.

  to generate:

  This is *italic* text.

You can combine bold and italic, like this:

- This is `<b><i>bold and italic</i></b>` text.

  to generate:

  This is **bold and italic** text.

**Paragraphs**
A single carriage return is converted to a line break, which appears like this:

- The first line of text.
  The second line of text comes right after the first line.

Two returns in a row are converted to a line space.

- The first line of text.
  The second line of text after a blank line.
Previewing a document
You can see a dynamic preview of your pages in several ways:
  • Click the document moniker in the browse screen.
  • Click the document moniker in the breadcrumb at the top of the edit screen.
  • Click the Submit and preview button in the edit screen.

Preview displays your page as it will be seen on the web with one very nice difference: If the page uses breadcrumbs, you can use these to navigate inside Pivot. If you click on the document moniker displayed in preview, it takes you back to the edit document screen. If you click on a section name it takes you to the browse tree for that section. When the page is published these breadcrumbs navigate the actual public site. But this is a handy in-place way for Pivot editors to move around the Pivot system.

Publishing a document
When you publish a document you combine the content you’ve created or edited with the template that the designer has supplied, and move that page to the public webserver where web visitors can view it.

If you have publish permissions, simply click the “publish” link in the browse view to get to the publish screen:

You can see the last modified and last published dates. Click the “Publish Document Now” button.

After a moment or two you will see the results screen:

Note that occasionally you will not be able to publish a single page, but will be asked to contact your site administrator to publish the entire site first. This is because the site structure has changed – either a moniker name has changed, or new sections or pages have been added. In this case, Pivot cannot guarantee that links will work unless the whole site is regenerated. This never happens when you’re just editing pages, but when many authors work on a website, one of your colleagues may make structural changes you’re not aware of and Pivot prevents any bad links from being published.
Advanced Tasks

HTML document formatting

HTML formatting is a power-user feature. One of the Pivot design goals was to make easy operations trivial (for the non-technical or occasional user) but also not get in the way of power users. In practice that means that we err on the side of the casual user. Casual Pivot users can make great looking websites knowing nothing about HTML. Power users get the ultimate control of using HTML, but they have to know what they’re doing—Pivot is not a design tool, it is a multi-user collaborative management tool.

If you set the document format to HTML, all of the content in the content block must be fully valid HTML. Line breaks are specified with \(<br>\), paragraph breaks with \(<p>\), etc. For most situations you will use an HTML editor like Macromedia Dreamweaver or Adobe GoLive and paste the source code into Pivot.

Note: Never use a word processor to generate HTML code. Microsoft Word in particular generates fragile HTML code that will break in many browsers. If you can’t format your content using text formatting, either use an HTML editor specifically designed for the task, or get help from a colleague or contractor.

Lists

The most frequent reason people use HTML formatting is to generate nicely indented bullet lists.

Unordered lists are created like this:

\(<ul>
  \<li>First item</li>
  \<li>Second item</li>
\</ul>\

Ordered (numbered) lists are created like this:

\(<ol>
  \<li>First item</li>
  \<li>Second item</li>
\</ol>\

Table layouts

The second most-frequent reason to use HTML formatting is to create more elaborate design structures inside the content block. In this case people often use HTML tables to provide more layout control. If you design HTML tables that you want to paste into Pivot, keep in mind that you must use only the code from the opening \(<table>\) tag to the closing \(</table>\) tag.

Important: You must omit the \(<html><head><body></body></html>\) tags. Copy and paste just the core part of the code that formats your content.

If you don’t understand any of the above, it means that you should stick to basic text formatting.
Create a new document
To create a new document, you “admin” the section where you want the document to live. Click the “admin” link next to the appropriate section and you’ll see this screen:

Click the “Add a document” link, give your new document a name and moniker, and click Add Document.

Create a new section
Creating a new section is very similar to creating a new document. Click the “admin” link for the parent section where the new section will live, then click the “Add a sub-section” link.

Provide a name and moniker for your new section and click Add Section.
Move a document or section
To move a document or section, “admin” the document or section, then click the “Move this document” or “Move this section” link.

Choose a new parent section by clicking on the desired section link. Note that if you move a section all the documents inside the section will also move. No internal links will be broken.

Publish the whole site
To publish the entire website, click the Admin link in the menu. Choose “Publish the site” and click the “Publish the site” button.

Publishing the site can take several minutes depending on the number of paged and especially the number of graphic files. Remember, publishing the site regenerates the entire website and copies it to the public webserver.

Here is what happens behind the scenes when you publish a website:

- First we combine all the documents with their appropriate templates and “export” the site to a local directory on the Pivot server.
- Next we connect with the public webserver and copy all the files to a “www.temp” directory.
- We then copy the existing public website into a “www.backup” directory on the public webserver.
- Finally, we copy the contents of www.temp up one level to the root of the public website, replacing the existing files.

This process minimizes the possibility for error. For any given site publish there are only a few seconds when operations affect the public site that visitors see. Everything else happens “behind the back” of the public site.

Note: As a website management service, PivotCMS takes control of the entire website. Manual website edits (i.e. through manual editing and FTP uploads) will be overwritten the next time Pivot regenerates the site – your work will be lost. Make all website edits inside the PivotCMS system.

PivotCMS does have an advanced method of integrating with other tools that need to control website directories. This operation is not covered in the User Guide. Contact XeniumGroup for details.