

# WebCRMA Basics: *Author Tools*



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## WebCRMA - Author Tools

**Overview:** The Author Tools is the interface into site content where users manage web pages and applications. Authorized users have the ability to create, edit, and manage their content. Web pages can be in the form of text based HTML files or they can use one of several pre-defined templates. File management functions include check in/out, upload/download, find, and promote to QA.

**Accessing WebCRMA:** The splash page for WebCRMA is at <http://www.niu.edu/webcrma/>. Select the Author Tools link and navigate to the folder containing your content.

The first page in Author Tools is the [Index Page](#). This page shows the folders and files within the site and contains the functions for managing those folders and files. These functions include:

<ul style="list-style-type: none"><li>• <a href="#">New File From Template</a></li><li>• <a href="#">New Text File</a></li><li>• <a href="#">New Folder</a></li><li>• <a href="#">Check All</a></li><li>• <a href="#">Clear All</a></li><li>• <a href="#">Copy To Folder</a></li><li>• <a href="#">Save As</a></li><li>• <a href="#">Delete</a></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Check In</a></li><li>• <a href="#">Check Out</a></li><li>• <a href="#">Promote</a></li><li>• <a href="#">Upload</a></li><li>• <a href="#">Download</a></li><li>• <a href="#">Version History</a></li><li>• <a href="#">Recycle Bin</a></li><li>• <a href="#">Find in File</a></li></ul>
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The main body of the Index Page contains the [folder and file list window](#). This window shows properties and statuses of the folders and files.

There are two editors within the Author Tools:




- The [Template-based File Editor](#) gives authors the ability to create pages using a common template providing consistency and ease of content creation. This editor also has a graphical editing tool which can be used to make rich content changes right in your browser without having to know HTML.
- The [Text Editor](#) can be used to create and edit plain text files, HTML files, scripts, etc.

\* NOTE - The maximum document size allowed in the template editor is 400 KB and in the text editor is 250 KB which in almost any case should more than suffice. However, when exporting HTML or copying from MS Word/Excel, it is possible to exceed this size as these applications can create very large HTML files. Click [here](#) for helpful tips on how to create smaller and cleaner HTML from MS Word/Excel.

# Index page

The index page is the main page of the WebCRMA Author Tools. It allows you to navigate the folder structure of the site and gives you the functionality required to perform web content maintenance.

## File List Window

Name	Size	Type	Date	Time	
<input type="checkbox"/>  <b>images</b> <span style="float: right;">Check Out   Check In</span>		Folder	5/4/2002	5:57:27 PM	
<input type="checkbox"/>  <b>index.htm (promoted)</b> <span style="float: right;">Check Out   View   Edit</span>	3.6 KB	HTML Document	3/23/2000	7:38:49 PM	
<input type="checkbox"/>  <b>sportclub.htm (approved)</b> <span style="float: right;">a20dji1   Check In   View   Edit</span>	1.4 KB	HTML Document	9/8/1999	2:19:04 PM	

| | | | | | | | | |

1 2 3 4 5 6 7 8 9 10

1) *Color coding* : Colors appear here in the following cases:

Yellow: File is pending reviewer approval.

Green: File has been approved and pending move to production.

2) A folder icon or an icon corresponding to the type of file is displayed.

3) Name of the file or folder

4) File status appears here in the following cases:

(Promoted): File is pending reviewer approval.

(Approved): File has been approved and pending move to production.

5) The name of the user who has the file checked out, otherwise blank. Files that are checked out to someone other than the current user will show as an e-mail link to the user who has the file checked out. This can be helpful if you wish to contact the user who has a particular file checked out.

6) 'Check In' or 'Check Out' button.

Files that are available to be checked out will have a 'Check Out' button.

Files that are checked out to the current user will have a 'Check In' button.

Files that are checked out to someone besides the current user will have a grayed out 'Check In' button.

7) Files that can be viewed will have an enabled 'View' button.

8) File that are checked out to you which can be edited will have an enabled 'Edit' button. When you select on this option, you will be taken to either the [Template-based File Editor](#) for template-based files, or to the [Text Editor](#) for text files.

9) File information. Size, Type, Date and Time of last modification.

10) Scroll bar, if necessary.

## File Menu

File	Tools	Go To	Help
New File From Template (.dwt)			
New Text File			
New Folder			
Check All			
Clear All			
Copy To Folder...			
Save As...			
Delete			
1 Ocr/bowling			
2 Ocr/bowling/images			
3 CSEAS			

<p><b>New File From Template</b></p>	<p>Select this option to create a new file from template. The <a href="#">'New File/Folder'</a> window will appear where you will need to type in the name of the file which will be created in the current folder. Note: Template-Based files must have an extension of 'shtml' or 'asp'.</p>
<p><b>New Text File</b></p>	<p>Select this option to create a new text file (HTML, TXT, etc.). The <a href="#">'New File/Folder'</a> window will appear where you will need to type in the name of the file which will be created in the current folder.</p>
<p><b>New Folder</b></p>	<p>Select this option to create a new folder. The <a href="#">'New File/Folder'</a> window will appear where you will need to type in the name of the folder which will be created in the current folder.</p>
<p><b>Check All Clear All</b></p>	<p>The Check All and Clear All options are used to select or deselect all files and folders on the current page.</p>
<p><b>Copy To Folder</b></p>	<p>To copy files or folders to a folder other than the current folder, select the files and/or folders to be copied, then select the 'Copy To Folder' option. The <a href="#">'Copy To Folder'</a> window will open up where you can select the destination folder.</p>
<p><b>Save As</b></p>	<p>To copy a file or folder to the current or a different folder, select the file or folder to be copied. The <a href="#">'Save As'</a> window will open up where you can select the destination folder and name for the file or folder.</p>

<p><b>Delete</b></p>	<p>To delete files or folders, select the files or folders to be deleted, then select the 'Delete' option. A dialog box asking 'Would you also like to delete these files from the production server' will appear.</p> <p>If you only wish to delete the files from the development site, select 'No'. Otherwise, select 'Yes' and you will be taken to a 'Promote' page where you can enter comments that might be useful for the reviewer(s) to read.</p> <p>An e-mail is then sent to the reviewer(s) notifying them that the files are available in the Reviewer Tools for them to review for deletion.</p>
<p><b>Three Most Recent Folders</b></p>	<p>The three most recent folders in which you have checked files out are listed. Selecting one of these links takes you directly to that folder.</p>

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## Tools Menu

Tools	Go To
<p>Check <u>I</u>n Check <u>O</u>t</p>	
<p>Promote</p>	
<p>Upl<u>o</u>ad Downl<u>o</u>ad</p>	
<p>V<u>e</u>rsion History R<u>e</u>cycle Bin</p>	
<p><u>F</u>ind in File</p>	

<p><b>Check In</b></p>	<p>For files that you have checked out, the 'Check In' button will be enabled. To check files or folders in and make them available for others to use, select the files or folders, then select the 'Check In' option.</p>
<p><b>Check Out</b></p>	<p>For files which are not checked out, the 'Check Out' button will be enabled. To check files and folders out so that only you can make changes to those files and folders, select the files or folders, then select the 'Check Out' option.</p>
<p><b>Promote</b></p>	<p>To promote a file to the quality assurance (QA) server where reviewers can look over your content, select the 'Promote' option.</p> <p>You will be taken to the <a href="#">Promote</a> page where you can enter comments that might be useful for the reviewer(s) to read.</p> <p>An e-mail is then sent to the reviewer(s) notifying them that the files are available in the Reviewer Tools for them to review.</p>

<p><b>Upload</b></p>	<p>To upload files to the current folder, select the 'Upload' option. An <a href="#">'Upload'</a> window will open where you can select the files that you wish to upload.</p> <p>If you have problems using 'upload', make sure you have the Microsoft Virtual Machine installed and that you have scripting enabled.</p>
<p><b>Download</b></p>	<p>To download files from the current folder, select the files you wish to download, then select the 'Download' option . A <a href="#">'Download'</a> window will open where you can select the destination for the files that you wish to download.</p> <p>If you have problems using 'download', make sure you have the Microsoft Virtual Machine installed and that you have scripting enabled.</p>
<p><b>Version History</b></p>	<p>To view and retrieve previous versions of files, select the files, then select the 'Version History' option. The <a href="#">'Version History'</a> window will open where you can view, select, and restore the previous versions.</p>
<p><b>Recycle Bin</b></p>	<p>To view and retrieve files and folders which have been deleted, select the files and folders, then select the 'Recycle Bin' option. The <a href="#">'Recycle Bin'</a> window will open where you can view, select, and restore the files and folders.</p>
<p><b>Find In File</b></p>	<p>To find all files that contain specific text, select the 'Find' option. A 'Find' dialog window will appear where you can type in the text you wish to search for. After processing the search, a list of all files containing the text you searched for is displayed. Files that are checked out to you will be displayed as a hyperlink that will take you directly into edit for that file.</p>

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## Go To Menu

<a href="#">Go To</a>	<a href="#">Help</a>
<a href="#">5 Refresh Current Page</a>	
<a href="#">7 Reviewer Tools</a>	
<a href="#">8 Statistics</a>	
<a href="#">9 Admin Tools</a>	
<a href="#">Q ITS Home Page</a>	

<b>Refresh Current Page</b>	Selecting this option refreshes the current page.
<b>Reviewer Tools</b>	To navigate to the Reviewer Tools, select the 'Reviewer Tools' option.
<b>Statistics</b>	To navigate to the Statistics, select the 'Statistics' option.
<b>Admin Tools</b>	If you are an administrator, you will see the 'Admin Tools' option. To navigate to the Admin Tools, select the 'Admin Tools' option.
<b>ITS Home Page</b>	To navigate to the ITS Home Page, select the 'ITS Home Page' option.

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## Help Menu

<a href="#">Help</a>	
<a href="#">WebCRMA Help</a>	
<a href="#">User: a20djl1</a>	

<b>WebCRMA Help</b>	Selecting this option takes you to the WebCRMA Help.
<b>Current User</b>	This displays the user id of the user currently logged in.