

FortWorthTexas.gov Website Bids Training Manual

Updated January 2021

New content management system for the City of Fort Worth website:



OpenCities

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Introduction

There are two types of bids:

1. **ERP/Buyspeed, bids placed by Finance Department only and shown on the website.**
2. **Manual Bids that are entered by the department editors assigned for entering manual bids to also show on the website.**

In 2020, the City of Fort Worth moved its website to a new content management system called Open Cities (OC). This move was intended to do a few different things:

- Give departments more control over the manual bids, allowing them to take a more active role in posting and editing their content.
- Manual bids can be approved by department's managers who will oversee the manual bids submitted. Manual bids approvers must be:
 - Managers of the editors who are submitting the post
 - Contact Web Admins to have managers added to the Open Cities CMS as approvers.
- Departments that enter manual bids, editors of manual bids and approvers of manual bids please view the list here.
- View more training material and videos here.

I. Roles in Open Cities

Every City of Fort Worth user in the Open Cities system is assigned a role, which comes with its own set of permissions and capabilities.

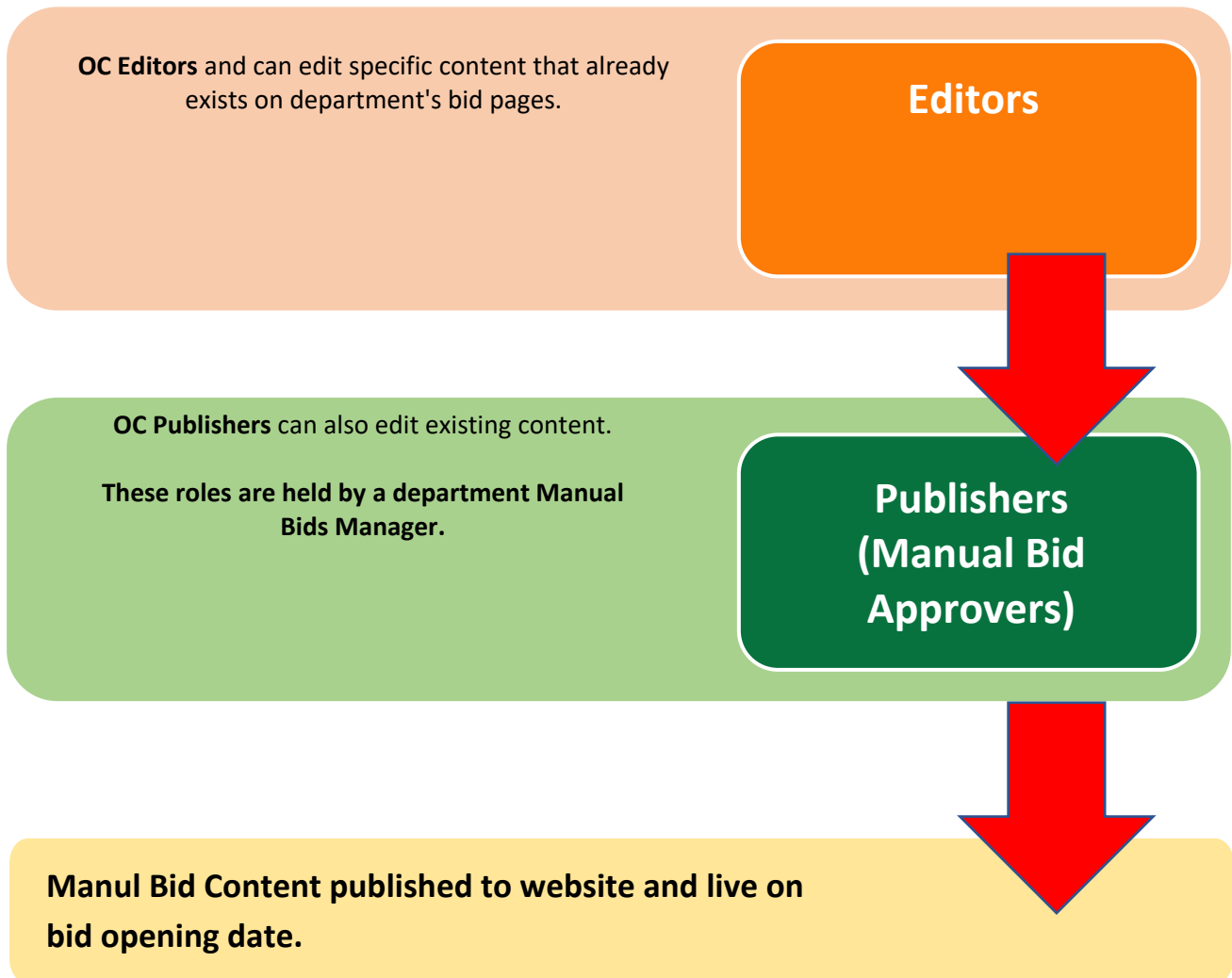
Roles also allow approval workflows to be created, so nothing gets posted on the city's website without the approval of a department's Manual Bids Manager.

These Manual Bids Manager workflows are especially helpful if the department members making the updates. The workflows also help make sure that every department's Manual Bids Manager are aware of every update being made to their section of the city website, so information on the website isn't being changed without the knowledge and approval of the them.

Important notes about roles:

- **People in different departments with the same role will not be able to edit or alter other departments' manual bids pages.** For example, if a person is designated a particular role in a Park & Recreation Department web workflow, that person would not be able to edit or change anything on the Code Compliance or Water Department bids. The only people with access to change anything and everything on the site are System Administrators/Site Managers.

While each department will have a slightly different approval workflow depending on the size of their web team, the basic roles and workflow for all departments will look similar to this:



NOTE: System Administrators/Site Managers will include the CPE Web Team.

Questions/issues about roles

If you are unable to perform an action discussed in this handbook, or if you need to add another member of your department team to Open Cities to make edits to your pages, contact the Communication & Public Engagement Office's web team. (System Admins)

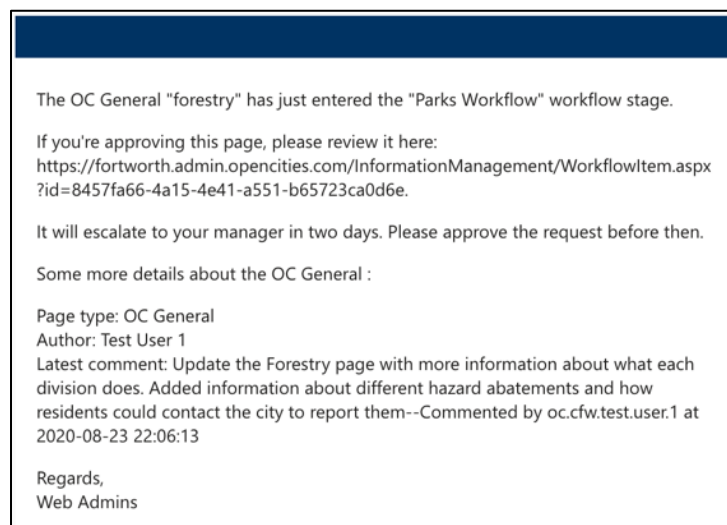
II. What does the approval workflow look like?

Once an bid editor makes a change on the website and that change enters the approval workflow, where does it go?

After an editor hits the green "submit" button on the page that they're editing, a screen will pop up that features a comment box.

Bid Editors should fill this comment box with as much detail as possible about the edits they've just made, in order to make their content's review/approval as efficient as possible down the line.

Once the bid editor submits their comment, an automatically-generated email will be sent to the Manual Bid Manager. That email will look like this, with certain sections edited depending upon the page/comment that was submitted by the editor:



Important Note: As the email says, if the person who is next in line in the approval chain does not submit their approval within three days, their manager will be alerted to the delay. This way, edits are kept flowing in a timely manner.

Approving content

Bid approvers can use the link in the email notifying them of a manual bid submission for their department. **Bid approvers should never select the delete button or delete versions button. Only System Admins should handle deletes.**

After clicking on the page that's been submitted for approval, the reviewer will need to pay special attention to the top of the screen.

They will then check the preview page for the following:

- Spelling - red line under spelling error.
- If information about the manual bid is accurate.
- If the links are correct.
- Use the preview button to view the page before publishing.
- Test the links



From here, the reviewer can proceed one of two ways:

- **Approve the content**, using the green button in the bottom right of the dashboard page. The content should be published to the site immediately once the highest level of approval has been reached.
- **Reject the content**, using the red button in the bottom left of the dashboard page, at which point the content editor will be notified of the rejection via email. **The reviewer will have an opportunity to provide the content editor with specific notes, which is strongly encouraged to prevent a drawn-out back-and-forth between content editor and reviewer.**

If rejected, the current version of the page (unchanged by the content editor) will remain on the website until the content editor corrects their issues and resubmits their content for another round of approvals.

Once the content editor sees that their changes have been rejected, they should be able to continue updating their content based upon the instructions in the rejection notice. After the requested changes have been made, the content editor can resubmit their update back through the approval workflow.

III. Getting oriented: Open Cities Dashboard

Finding Department's Manual Bids Pages

From your dashboard, clicking on either the **Department** shortcut or the **Pages icon** in the top navigation will bring you to a menu of all the pages on the city website.

- You can use search for manual bids folder by using the search bar with the magnifying glass icon or you can use the left-hand navigation to expand areas you'll be working in by expanding the arrows.
- To drill down on the left-hand navigation, **click the tiny arrow on the left side of Departments** to view the child pages in that folder. Your main screen should now be filled with a list of city departments; click yours.

The screenshot shows the 'Web Pages' search interface. On the left, a sidebar lists navigation options under 'Public', including 'Home', 'residents', 'business', 'departments', and various city departments like 'cityattorney', 'citysecretary', 'code-compliance', 'communications', 'development-services', 'diversity-inclusion', 'ecodev', and 'finance'. The 'departments' folder is expanded, showing 'View child pages (30)' and a list of departments. The 'manual-bids' folder is highlighted. The main search area has filters for 'Page name' (set to 'manual'), 'Page publisher', 'Page owner', 'Workflow stage' (set to 'All workflow stages'), and 'Content type' (set to 'All content types'). A search bar with a magnifying glass icon is at the top right. Below the filters, a table displays search results. The table has columns for 'Item Name', 'Status', 'Author Name', and 'Owner Name'. Two items are listed: 'manualidades-para-todos' and 'manual-bids'. The 'manual-bids' item is highlighted. At the bottom, there is a 'Bulk Actions' dropdown and a 'Show 20 items' dropdown.

Item Name	Status	Author Name	Owner Name
manualidades-para-todos	Published	Theresa Davis	Bethany Warner
manual-bids	Published	Ellen Marquez	Ellen Marquez

The screenshot shows the 'manual-bids' folder expanded in the left sidebar. The sidebar lists 'View child pages (12)' and a list of folders: 'manual-bids', 'propm', '2021', 'city-hall-n', 'available-', and 'available-'. The 'manual-bids' folder is highlighted. The main content area displays a list of folders. Each folder has a checkbox, a folder icon, a name, a type, an author, and a status. The folders are: 'eqsvd', 'finan', 'pacs', 'propm', 'tramp', 'water', 'nondp', and 'plndv'. All folders are 'OC Folder' type, created by 'Ellen Marquez', and are 'Published'.

Folder Name	Type	Author	Status
eqsvd	OC Folder	Ellen Marquez	Published
finan	OC Folder	Ellen Marquez	Published
pacs	OC Folder	Ellen Marquez	Published
propm	OC Folder	Ellen Marquez	Published
tramp	OC Folder	Ellen Marquez	Published
water	OC Folder	Ellen Marquez	Published
nondp	OC Folder	Ellen Marquez	Published
plndv	OC Folder	Ellen Marquez	Published

IV. Bid Pages

Working on bid pages – Checking in and out

One important security feature of the Open Cities website is that two individuals cannot work on the same page at one time. View FAQs Access Questions document. This keeps one person from accidentally overwriting or changing the second person's work (or vice versa) and ensures that there's a single version of a page (no duplicates) on the website at any given time.

WIP means the page is not live as a Work in Progress page and can be edited and previewed before submitting the page to the approval stages.

The right column will give you a status on the page who has it checked out, who last edited it as well. Always after previewing and saving check it back in at the same location as the check out button for others to access the file.

To edit an existing page that is published use the Update button to edit the page. You know it is published by the See live page showing.

The screenshot shows the 'available-change-this-2' bid page in a 'WIP' (Work in Progress) state. The page title is 'available-change-this-2' with a yellow 'WIP' tag. The URL is '[Public]/departments/finance/purchasing/bids/manual-bids/propm/2021/available-change-this-2'. The page has tabs for 'Overview', 'Settings', 'Links', and 'History', with 'Overview' selected. A 'Preview' button is in the top right. The main content area has a 'Page name' field with 'available-change-this-2'. Below it is a 'Bid or tender title (Required)' field with 'Available to edit and turn into a bid - change' and a '24 characters left' indicator. Next is an 'Add bid or tender summary for listing' field with 'Available to edit and turn into a bid - To update use the update button in the top right. Change this text. Open the blue edit box after selecting an update.' and a '241 characters left' indicator. Below that is an 'Add bid or tender reference number' field with 'Number of bid goes here here'. At the bottom are several dropdown menus: 'Closing date', 'Status of bid or tender', 'Contact Information', 'Winning entity information', and 'Supporting information'. On the right side, there is a 'Template Name' dropdown set to 'OC Default', and a section showing 'Content Type : OC Bids and Tenders', 'Owned by : Karen Hall', and 'Last edited by : Karen Hall'. At the bottom left are 'Delete Version' and 'Check Out' buttons, and at the bottom right is a 'Preview' button.

The screenshot shows the 'city-hall-relocation' bid page in a 'Published' state. The page title is 'city-hall-relocation' with a green 'v4 Published' tag and a blue 'See live page (v4)' link. The URL is '[Public]/departments/finance/purchasing/bids/manual-bids/propm/2021/city-hall-relocation'. The page has tabs for 'Overview', 'Settings', 'Links', and 'History', with 'Overview' selected. An 'Update' button is in the top right. The main content area has a 'Page name' field with 'city-hall-relocation'. Below it is a 'Bid or tender title (Required)' field with '43 characters left'. On the right side, there is a preview of the page layout. At the bottom right are 'Update' and 'Preview' buttons.

Bids Template page is exactly the same for each manual bid

1. **Page name:** The page name is for the URL, use lowercase with dashes. Example: lifeguard-training
2. Bid and Tender Name is the title that will appear on the page itself, which viewers will be able to see and it is limited to a number of characters.
Example: lifeguard-training Bid or tender title
3. **Purpose of the content:** This should be a brief description of the content, which will be viewed in the search bar by users and indexed in Google to drive Search Engine Optimization (SEO). It will be a brief summary for the bids page of the bid.
4. **Add bid number or tender reference:** enter the bid number.
5. Expand the **Closing date:** enter the day of closing for the bid.
6. Expand the **Status of bid or tender:** Use drop-down to select the status of bid, open closed, etc. Set the awarded or not rewarded or leave unchecked. This can be updated later as the bid progresses.
7. Expand the **Contact Information:** enter the contact information or leave blank. (If you do not see required, this field is not required.)
8. Expand **Winning entity information:** this is where you can display details on the bid being awarded if you wish to show this information during the progress of the bid, this is not required field.
9. **Supporting information:** This is the section where you can add supporting links to other related pages on the website, and/or link to supporting documents (like PDF reports) to add context to the information on the page. These links and documents usually appear in a "Related information" section at the bottom, or in another column, of the page.

NOTE: Before starting the process of linking a supporting document or supporting link to a page, the link must exist, document is loaded to the File tab under the department and published to the site. You can link to the AutoDesk link within the supporting information.

10. While that covers the basics, if you would like to add even more information to the body of the page, you'll need to go to the top right section to where your page template is located, and click the blue box with a pencil in the middle of it. This area is called the **WYSIWYG Editor**. (Pronounced "whizzy-wig", it stands for "What You See Is What You Get", meaning the content will show on the web exactly as viewed here.) A better description of the bid is a good idea since it will be searchable.

11. Use the settings tab to set the date when the bid starts and can be displayed to the public.

available-change-this-2 v2 WIP

[Public]/departments/finance/purchasing/bids/manual-bids/propm/2021/available-change-this-2

Overview Settings Links History Preview Submit Review Save

Page name
available-change-this-2

Bid or tender title (Required) 24 characters left
Available to edit and turn into a bid - change

Add bid or tender summary for listing 241 characters left
Available to edit and turn into a bid - To update use the update button in the top right. Change this text. Open the blue edit box after selecting an update.

Add bid or tender reference number
Number of bid goes here

Closing date

Status of bid or tender

Contact Information

Winning entity information

Supporting information

Template Name
OC Default

Content Type : OC Bids and Tenders
Owned by : Karen Hall
Checked out by : Karen Hall
Checkout Date : Jan 19 2021 06:17 PM

Spell Check All

Delete Version Check In Preview Submit Review Save

Closing date for bid or tender (Required)

Time Zone (UTC-06:00) Central Time (US & Canada)
Date Time Thursday, October 15 2020 01:30 PM
Remove **Edit Date & Time**

And display following instead

400 characters left

ABC

Status of bid or tender

Select the status of the bid or tender

Open

Has the bid or tender been awarded?

☐ Yes

☐ No

Date awarded

 Add Date & Time

Contact Information

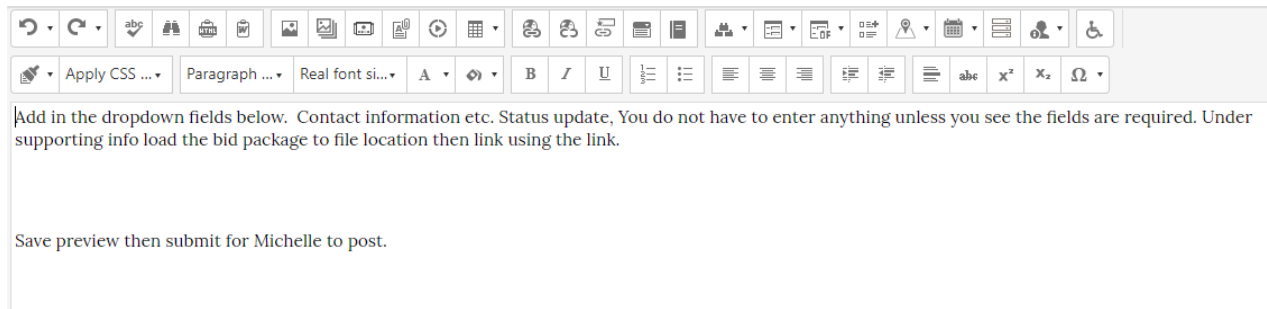
Name

Vicki McDonald

Email

Phone number

Alternate phone number



Blue edit box uses tools to edit the pasted in copy with more details about the bid. Use the tools above to add links, make text bold or indented.

Hover over each tool:

VI. Editing your page's content in the WYSIWYG Editor







Now that we've covered some of the more basic templates that you'll run across, let's get into some details about how to edit content in the main body content of your pages using the WYSIWYG (pronounced "whizzy wig") Editor – that blue box with the pencil in it that you'll find in your page template layouts. WYSIWYG stands for "What You See Is What You Get, meaning what you see here will look the same on the web.


This body content area of your page is the section where you can get the most creative in terms of layout and how your content will be organized.



You can tweak your content's look, feel, and organization using the tools located in the top navigation of the body content window. You might recognize many of these icons from other programs you might be familiar with, like Microsoft Word or GovDelivery. Many of these icons perform similar functions in Open Cities as they do in other programs.


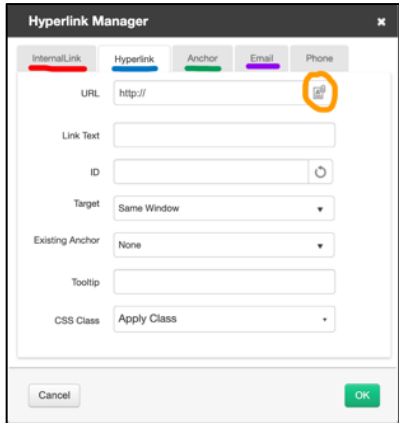
However, there are also a number of icons at the top of the body count window that are specific to Open Cities.



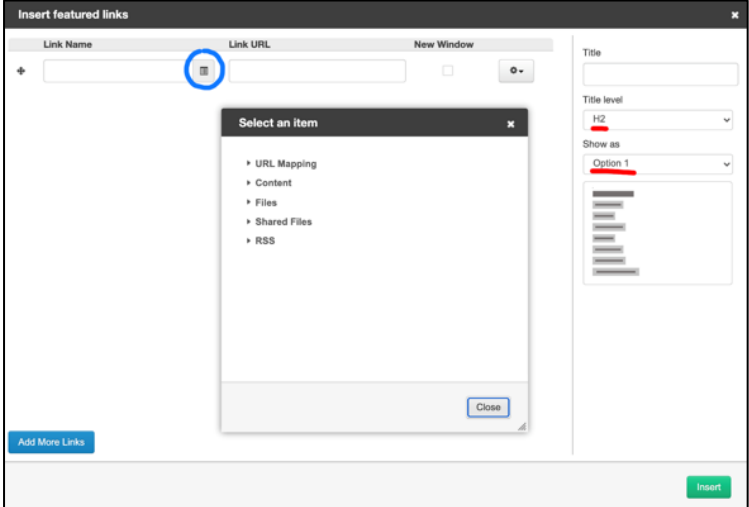
A list of the main icons you should know, from left to right, is below. Next to each icon is information explaining what it does, with visual examples where possible.

Icon	Tool name	TOP ROW NAVIGATION: What it does
	Undo	This button undoes your most recent action on the page. Clicking the down arrow allows you to undo several recent actions simultaneously.
	Redo	The opposite of the undo button, this button allows you to redo multiple actions if you've reversed them via the undo button.
	Spellcheck	Spellcheck will comb through your content looking for spelling errors. Always recommended.
	Find and Replace	Looking for a particular word in a very long document? Need to replace a word or phrase that is repeated multiple times in a single page? This is the tool for you.
	Paste HTML	You shouldn't need to use this tool very much, unless you're pasting in complex HTML. It's recommended that department users reach out to the web team before using this function.
	Paste from Word / strip font	This is a very important icon that should be used often. When copying/pasting text from Outlook or Microsoft Word documents, the text will NOT automatically conform to the correct font used by the website. (In fact, the website might not be able to correctly read or display the font that you're pasting in.) If you're copying/pasting text from Outlook or MS Word into the website, be sure to click this button to open the new window, and insert your text there so it loads correctly.


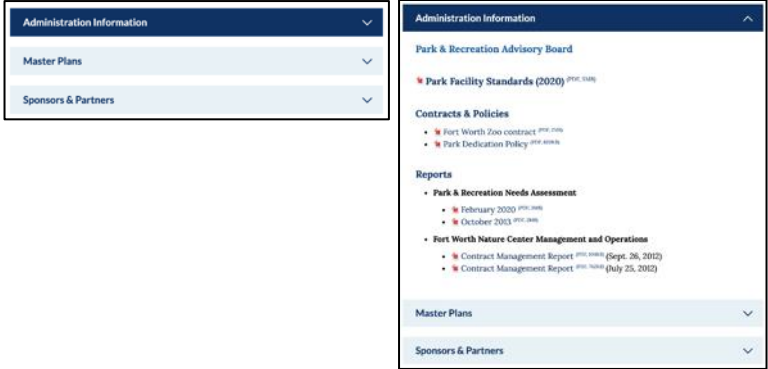

	<p>Document Manager</p>	<p>Similar to the Image Manager, if you'd like to link to a PDF document that already exists on the website, this is the way to do it. <i>(Tip: It will work faster if your image is already loaded into the website / approved through your department's workflow.)</i></p> <p>Remember, you do not need to re-add a document multiple times to get it to appear in multiple places on the Open Cities website. You can reuse the same link from the same document, if it has already been loaded into the system.</p> <p>Please note that if you're linking to a PDF document, a PDF icon will appear next to your link in the final copy.</p> <p>For more on how to insert documents, see the Files, Documents and Images section.</p>
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	<p>Table Wizard</p>	<p>When inserting large amounts of data, it sometimes makes sense to incorporate that data into a table, which creates a grid that helps keep that data organized.</p> <p>Open Cities' Table Wizard behaves similarly to that of Microsoft Word. Clicking on the icon will open up a series of boxes that you can highlight to indicate how many columns and rows you will need, and the table will appear on the page. In order to add or delete more rows/columns, right click on the table to access a menu to further tweak your table.</p> <div data-bbox="1175 1003 1409 1360">  </div> <div data-bbox="766 1465 1295 1726"> <table> <caption>Annual Community Center Membership</caption> <thead> <tr> <th>Type</th><th>Resident</th><th>Non-Resident</th></tr> </thead> <tbody> <tr> <td>Youth (Ages 17 & Younger)</td><td>\$25</td><td>\$45</td></tr> <tr> <td>Adult (Ages 18-59)</td><td>\$40</td><td>\$60</td></tr> <tr> <td>Senior (Ages 60)</td><td>\$20</td><td>\$35</td></tr> <tr> <td>Family (5 people/1 address)</td><td>\$100</td><td>\$150</td></tr> <tr> <td>Additional Family</td><td>\$15</td><td>\$25</td></tr> </tbody> </table> </div>	Type	Resident	Non-Resident	Youth (Ages 17 & Younger)	\$25	\$45	Adult (Ages 18-59)	\$40	\$60	Senior (Ages 60)	\$20	\$35	Family (5 people/1 address)	\$100	\$150	Additional Family	\$15	\$25
Type	Resident	Non-Resident																		
Youth (Ages 17 & Younger)	\$25	\$45																		
Adult (Ages 18-59)	\$40	\$60																		
Senior (Ages 60)	\$20	\$35																		
Family (5 people/1 address)	\$100	\$150																		
Additional Family	\$15	\$25																		

	<h2>Hyperlink Manager</h2>	<p>The Hyperlink Manager is a very important tool that allows you to create links on the page you're working on. Clicking on the Hyperlink Manager opens up a new menu box, which gives you a few different options:</p>  <ul style="list-style-type: none"> • Internal link tab: If you are linking to a page that is already created on the city website, click this tab at the top of the menu to locate the page in the site tree. • Hyperlink tab: If you are linking to a page that is NOT located on the city's website, use the Hyperlink tab. • Anchor tab: If you would like to create an Anchor link that links to a certain section of your page (usually this would link to a Heading 2 or a Heading 3), then this is the option to use. • Email tab: If you would like to create a link that will allow residents to email a particular person, use this tab to enter that email address. That way, when the link is clicked on, it will automatically open up an email in the residents' browser so they can start writing. • If you would like to link to a document that's already on the website, click the document icon circled in orange in the diagram above.
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	<h3>Remove Link</h3>	<p>This is the opposite of the Hyperlink Manager. If there's a link on your page that you don't want to link anywhere anymore, you'd highlight the link and click this icon to remove it.</p>
	<h3>Insert Featured Links</h3>	<p>Featured links are like an arrangement of multiple buttons, lined up together and preformatted.</p> <p>To insert featured links, click on the button and a new window will open.</p>  <p>Use the small menu button circled in blue to link to pre-existing pages and documents on the city website (the resulting link URL will look weird, but don't worry, it will work like it should!) or add the link URL if you're linking off the city site.</p> <p>You can also use the options on the right side of the screen to arrange these links in different row and column layouts, or change the link's heading sizes.</p> <p>To add multiple links, use the blue button in the bottom left of the window. Once you're finished, click the green "insert" button at the bottom of the window to insert it into the page.</p> <p>If you need to edit these links again, right click on the green box and click the "Edit featured links" option that pops up.</p>

	For spacing reasons, it's best to only have a maximum of four featured links per page. Otherwise they overlap on top of each other and become difficult to read.
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	<p>Insert Accordions or Tabs</p>	<p>This may be the most useful tool at your disposal as a web editor, because it allows you to create accordions and content sections with tabs that will let you organize large blocks of text into smaller, interactive pieces, with the ultimate goal of taking up less room on the page.</p> <p><i>Example of an accordion menu. The menu is retracted on the left and saving space on the page, and expanded on the right, revealing its contents to the viewer.</i></p> <div data-bbox="643 579 1406 945">  </div> <p>Creating an accordion menu or tab menu is very similar to creating Featured Links (as mentioned above), in that clicking the icon will open a second window that lets you go in and add the information for a specific accordion dropdown line by line. Tables, images, lists of links or supporting information can all be added to these accordions.</p> <p>Department editors are strongly encouraged to use accordions as much as possible, to prevent residents from having to read through long paragraphs of supporting details that may not be relevant to their needs.</p>
	<p>Accessibility checker</p>	<p>This handy tool allows you to check your webpage edits to make sure that they're in line with ADA (Americans with Disabilities Act) guidelines.</p> <p>The city must legally strive to remain compliant with ADA accessibility standards, and this tool will help you identify any areas where your page can be improved to meet those standards.</p>

The second row navigation in the WYSIWYG Editor is very similar in layout and functionality as the navigation you'd find in Microsoft Word or GovDelivery. There are buttons to make text **bold** or *italic*, there are buttons that impact paragraph alignment and add bulleted or numbered lists.

However, there are a few more special items of note that department editors might find helpful:

Icon	Tool name	SECOND ROW NAVIGATION: What it does
Apply CS... ▾	Apply CSS	<p>"Apply CSS" is just a fancy programming way of saying that you can apply some specially-coded designs to certain elements of the page.</p> <p>By highlighting certain text and using the "Apply CSS" dropdown menu, you can make your text stand out by turning:</p> <div> <p>A link into a styled button</p> <p>An important paragraph into emphasized text</p> <p>Put an emphasis on an important point or section.</p> </div>
	Horizontal Rule	<p>A horizontal rule adds a light horizontal line across the width of the page, to help break up large amounts of text or information about different subjects.</p> <div> <p>The Empire Strikes Back</p> <p>The Return of the Jedi</p> </div>

How to use headings

As a reminder, both for ADA reasons and to help users better navigate the image, it's important that your headings do ?? in descending order, from largest to smallest.

This creates a hierarchy of information, in which the most important titles and headings are in larger sizes, and the size of the headings grows smaller as the content within

them gets more and more specialized. For example:

Heading 1 is usually the page title.

Heading 2 is usually the section title.

Heading 3 is usually a sub-title within the section

Body text is usually the "normal text" used to convey the bulk of your information.

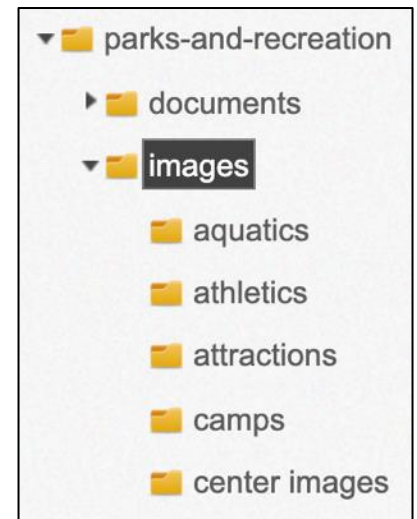
VII. Files, documents and images

Documents and images are located in a slightly different area of the Open Cities website than the main pages. However, users will notice that these files are organized by department, much like the main pages.

When users go to their department folder to begin the process of loading a file into Open Cities, they'll see that their department folder has been organized into two categories: one folder for documents, and one folder for images.

Documents are full-page PDF files with a lot of written information in them. Examples of documents that might need to be loaded to Open Cities are board meeting minutes, multi-page master plans, budget books, etc.

By contrast, **images** are usually smaller photos or graphics used around the website. These can take the form of slider images, photos embedded into pages, or marketing/promotion materials that add visual interest to a page.



But what about forms and applications?

Over the years, many departments have gotten into the bad habit of creating forms that residents are expected to fill out and either print/mail or email back to the City of Fort Worth for processing.

Going forward, the web team will be working with departments to identify these PDF forms and replace them with a combination of Service pages and Open Cities' Open Forms. Not only will this cut down on the number of PDFs in the system, it will provide residents with a much easier experience when applying for city services/programs, and it will allow city employees to process these forms digitally. The Open Forms platform will be part of a future phase of the website roll-out.

V. Adding and linking documents placed on Open Cities

Naming and sizing documents and images

While many people have their own filing and organization systems, it's important that all city users of the Open Cities website try to stick with consistent city-wide naming conventions for their documents and images.

Not only will this keep their department pages well-organized, but in case assistance is needed from members of the web team, or documents need to be shared in other areas of the website, they'll be easier to quickly track down, identify, and post.

Images should be named as simply and as specifically as possible, with dashes (-) separating the spaces between words.

- If the image is of a location, the name of the location should be spelled out completely, without using acronyms. *Example: "victory-forest-community-center", versus "VFCC" or "Victory Forest CC".*
- If the image is the feature image on a page, feel free to name the image something relative to the page it's on. *Example: "youth-soccer" or "foster-pets".*
- If the image is part of a marketing campaign, or promotion around a specific event, make sure to include the date in YYYY-MM format in the image name so it can be identified easily. *Example: "2020-05-pet-adoption" or "2020-06-camp-fort-worth".*
- When updating the image alt tag or tool tip – the "alternative text" that screen readers see for those with vision problems – you can use spaces, capital letters, etc. and make your text more descriptive if you choose. *Example: "Kids playing soccer" or "child hugging dog".*

Documents should be named starting with the name of the file, followed by the date that they are uploaded. Names should be as specific as possible, including department names when appropriate. (Remember, you're not the only department in the organization who may have a budget or strategic plan document on the website!)

Example: "Annual-Report-2020" or "Stormwater-Strategic-Plan-August-2021".

Please note: Many of the images and documents currently in Open Cities may not correspond to these naming conventions, as they were migrated over using whatever names they were called on the GitHub site. (As such, the documents are likely used in print collateral, meaning we need to keep the names consistent with the old website.) It will be up to department liaisons to "clean up" the names, labels, and file descriptions of these documents for their portion of the website, and to use these naming conventions moving forward for consistency.

Document and image sizes

Unless otherwise specified by your Communication Officer, images loaded onto the website should be specific sizes. Not only does this allow for consistency across the website, but it also allows for the same images to be used in multiple places – as sliders, in the city’s email newsletters (like *City News* and *Roundup*), and as Facebook posts.

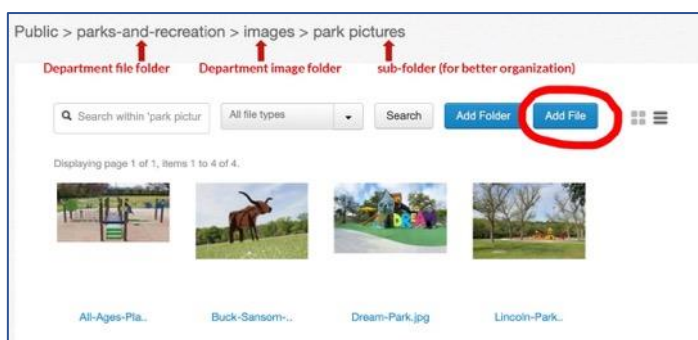
- **Horizontal images** should be 1200 pixels wide by 628 pixels tall.
- **Square images** or **vertical images** should be at max 1200 pixels wide.
- All images should be as high-quality as possible to start with, in order to prevent any pixilation or blurriness once posted to the website.

Uploading documents and images

1. Log into Open Cities and click the “Files” option in the top navigation.
2. Find your department’s folder in the file system, then click the sub-folder that your file belongs in: the “documents” folder, or the “images” folder.
3. Double-click on either the “documents” or the “images” folder, and all of the subfolders and files should appear in the main part of your screen.
4. You’re now ready to begin the upload process. Now you can either:

a) Create a new folder to house your new image(s) by clicking the “add folder” button in the top right corner,
or

b) Double-click an existing folder,
and
once it opens, add a document or image to that folder using the “add file” button in the top right corner.



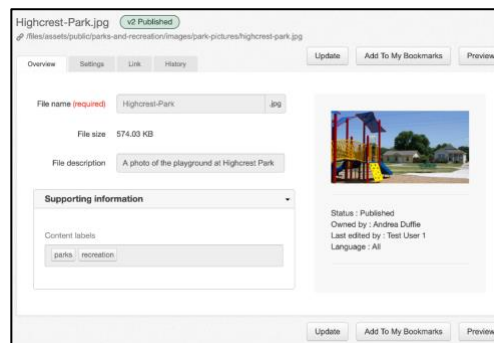
TIP: If you ever become uncertain which folder you’re in, check the navigation text at the top of the page. It will list the department file folder, the image folder, and whichever folder you’re currently in.

5. Once you click the “Add file” button, you’ll be taken to a screen with a blue button at the top that says “Upload a file”. Click that button to select whichever document or image on your computer that you would like to load into the system.

6. Once you’ve selected your file, click the green “start upload” button at the bottom of the page. Leave all of the checked/unchecked File Configuration Options alone.

7. After a file uploads, add a file description and content labels. This is very important, because the file description functions as “alt-text” to help the website meet accessibility standards for the vision-impaired.

This description should be something straightforward, describing the image or document. Something like “a photo of the playground at Highcrest Park”, or “PDF document of the agenda for the Urban Design Commission”.



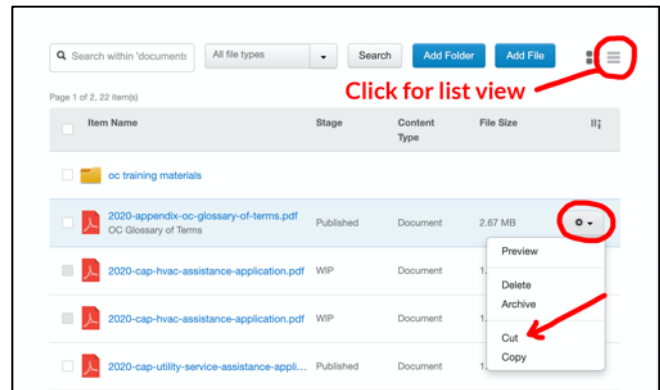
8. Publish the file. Once you click “publish”, the file will enter your department’s workflow for approval. The file will not be accessible for use until approved by a department PIO or Communications Officer.

Organizing documents and images

Depending on your level of permissions, you may be able to organize your team’s documents and images in Open Cities.

Go to your department's documents/images folder and **make sure you're viewing the documents/images in list view instead of viewing them as thumbnails.**

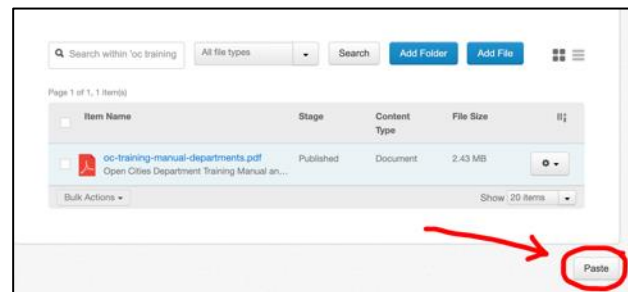
(You can click the three bars in the top right of the page to make sure it's showing up the correct way.)



Then, locate your document and click the gear button on the far right. This should open a drop-down menu with the "cut" option available.

Cut your document and click inside the folder where you'd like it to live. Inside that folder, you'll see a "paste" button in the bottom right corner.

Clicking that button should allow you to move your document there.

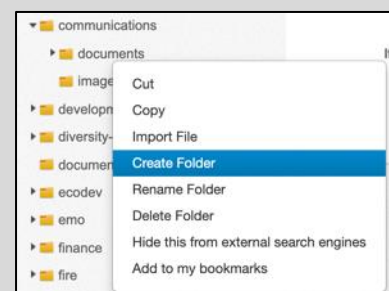


IMPORTANT NOTE: You will need to CUT your documents when organizing them instead of copying them. Copying your image will not carry over the pages/areas of the site where your document is already linked. Only cutting and pasting will do that.

Adding a folder

If you would like to add a sub-folder within your documents/images folder, right click on it and select the option to "create a folder".

Then enter that folder's name.



How to link a document on a webpage

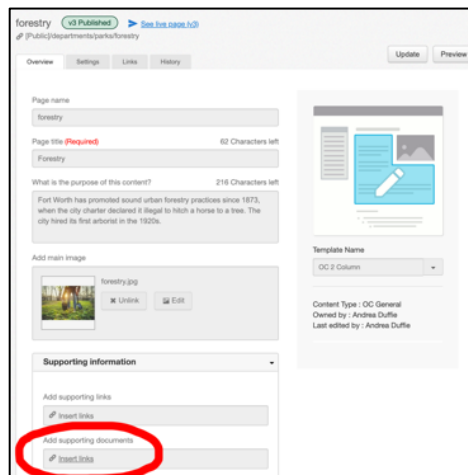
NOTE: Before starting the process of linking a document or image to a page, the document/image must have already been published to the site and approved in the workflow as outlined in the section above.

1. Go to the page where you would like to link the document, and click “update” to begin work on it.

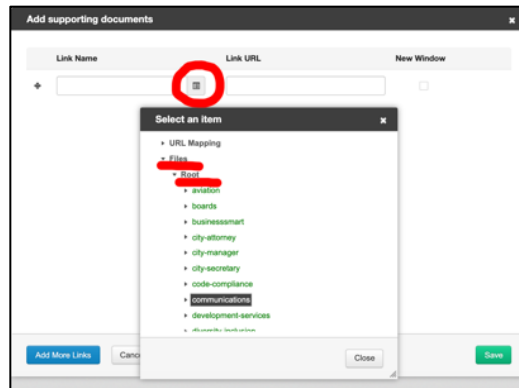
From here, you can proceed one of two ways:

OPTION 1: If you’re linking a document that qualifies as “supporting information” to the page, scroll down and expand the “Supporting information” section of the page.

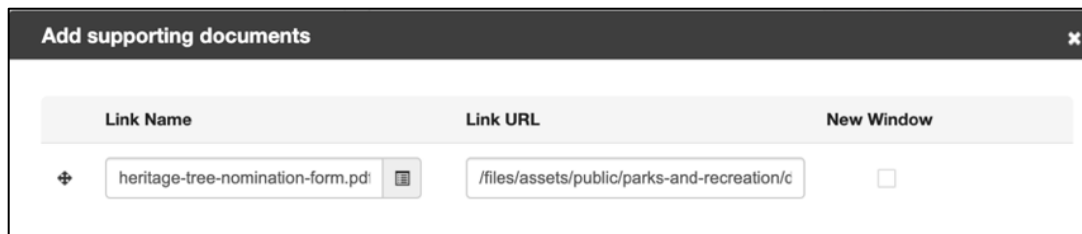
2a. Click the “insert links” box in the “Add supporting documents” section.



3a. This will open an “Add supporting documents menu, and you’ll need to click the gray menu icon under the “link name” in the left column. This will allow you to select an item to link; expand the “Files” and “Root” sections to locate your department and access your images/documents folders.



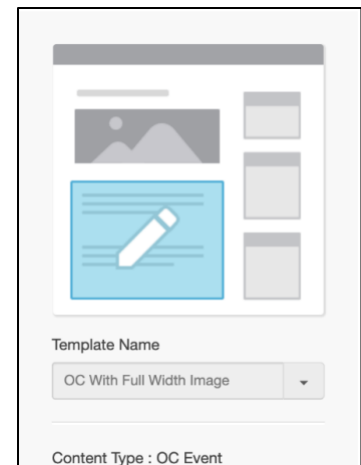
4a. Select which image/document you would like to link. This will automatically generate a site-specific link to populate in the right column...DO NOT CHANGE THIS LINK. You can also use this opportunity to determine whether or not this link will open a new window when it is clicked.



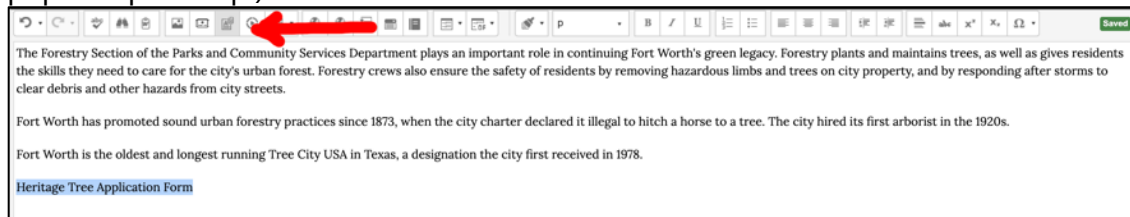
5a. Click the green “save” button.

OPTION 2: If you’d like to link document in the body of the page, click “update” to begin working on it and then click the blue box on the page layout in the top right corner.

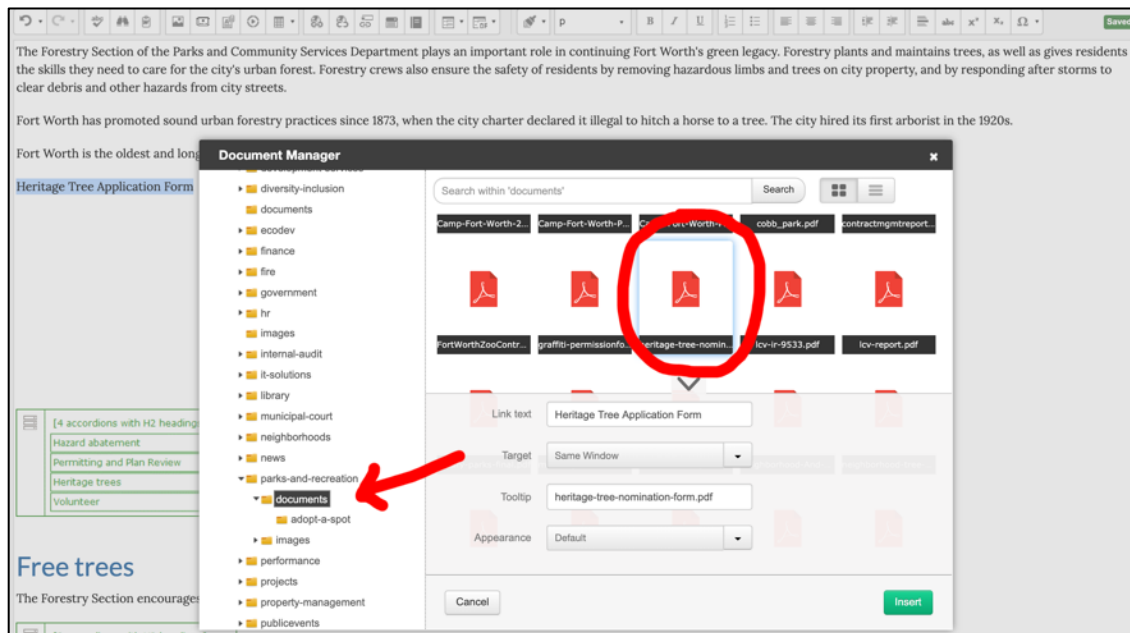
2b. In the body content screen, type the out the text you wish to link, or highlight existing text, and click the “Document Manager” icon in the top navigation. (It looks like a rectangle with an “A” inside of it, and a



paper clip on top.)



3b. Expand the group file folder until you get to your department's document and image files, then identify the document you'd like to link.



4b. Click the green "save" button.

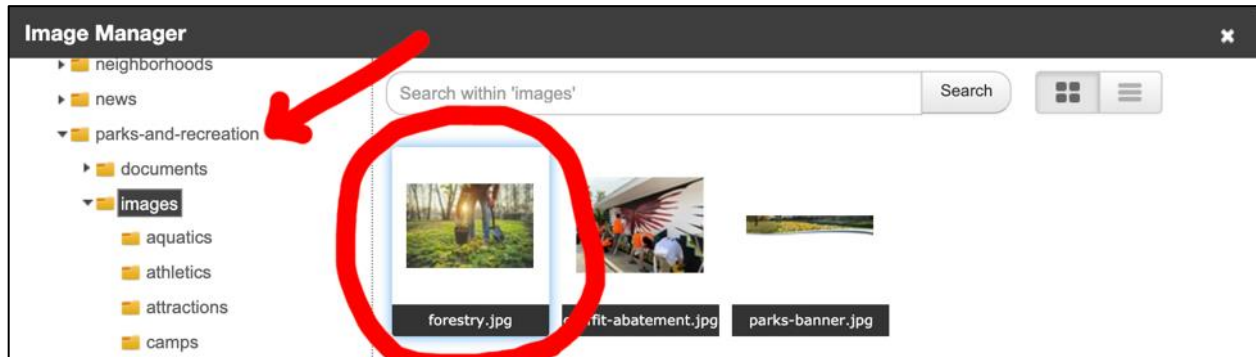
How to embed an image on a webpage

NOTE: Before starting the process of linking a document or image to a page, the document/image must have already been published to the site and approved in the workflow as outlined in the section above.

- 1. Go to the page where you would like to embed the image, and click "update" to begin work on it.**
- 2. Click the blue box on the page layout in the top right corner. The "body content" screen should pop up.**

3. In the body content screen, put your cursor in the place you'd like to embed the image, and click the "Image Manager" icon in the top navigation. (It looks like a rectangle mountains and a sun, directly to the left of the Document Manager icon mentioned in 2b above.)

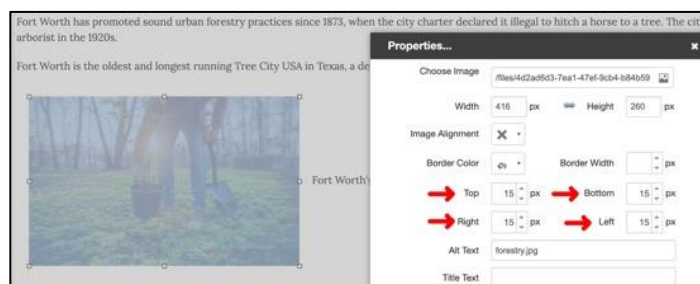
4. Expand the group file folder until you get to your department's document and image files, then identify the image you'd like to embed.



5. Click the "insert" button and the image should appear in the body of the page.

6. Important tips to consider:

- When resizing the image, make sure to stretch the image proportionally using the white squares in the corners of the image.
- Make sure to **highlight the image right click to access the Properties menu**, so you can set padding around your image – that way, any text that wraps around the image isn't too close to the image. **Ideally, when your image is next to text, your padding between the image and the text should be at least 15 pixels.**





The space between this paragraph and the image next to it is an example of what padding around an image does.

If the padding was not here, this paragraph would be so close to the image that it would look weird on the screen. It wouldn't have any room to breathe.

Use the alignment tools at the bottom of the screen to align your image to the left, right, or center, in order to create a "word wrap" where text wraps around the image like this, instead of leaving large, empty white spaces everywhere.

Overwriting/saving over documents or images

Sometimes, department liaisons might be tempted to "take a shortcut" by editing a document or image and replacing it with a completely new version.

For example, Cowtown Cleanup is an event that is hosted every year, but the marketing materials for that event usually change from year-to-year.

Department liaisons can either edit / re-upload an existing image and overwrite it with a new version or edit the image name to reflect that update; OR they can add a completely new image.

Please note: If an image is overwritten by accident, you will need to contact a member of the Communications Web Team to restore it to its original version.