# Titan Workflow Training Guide

## TitanCMS™ V6.8 Content Management System

**Updated:** Oct. 2018

**Prepared by:** MPS Department of Communications and Marketing, and Northwoods Web Solutions

- Website: **http://mps.milwaukee.k12.wi.us**
- mConnect: **http://mconnect.milwaukee.k12.wi.us**
- Titan Workstation: **https://wkst.milwaukee.k12.wi.us**
- *User ID:* _____
- *Password:* _____

  *(Change password upon workstation login)*

## Contents

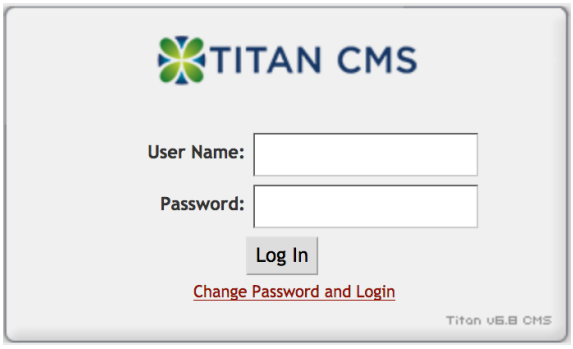
# Lesson A: TitanCMS Workstation Overview

**What you'll learn:**

- How to navigate the workstation
- How to navigate the dashboard
- How to use Search to locate an item

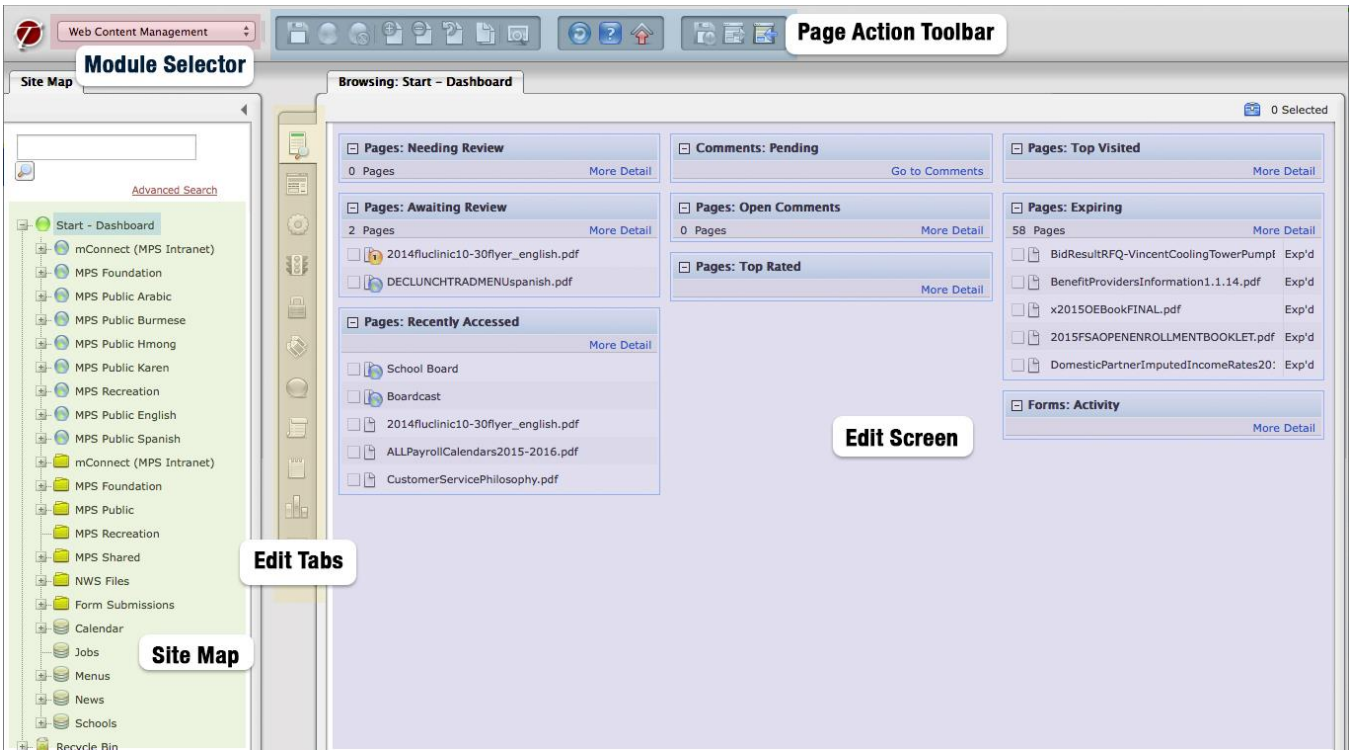
## Logging into the Workstation

Login to the workstation. The URL for the workstation is listed on the front cover of this handout.



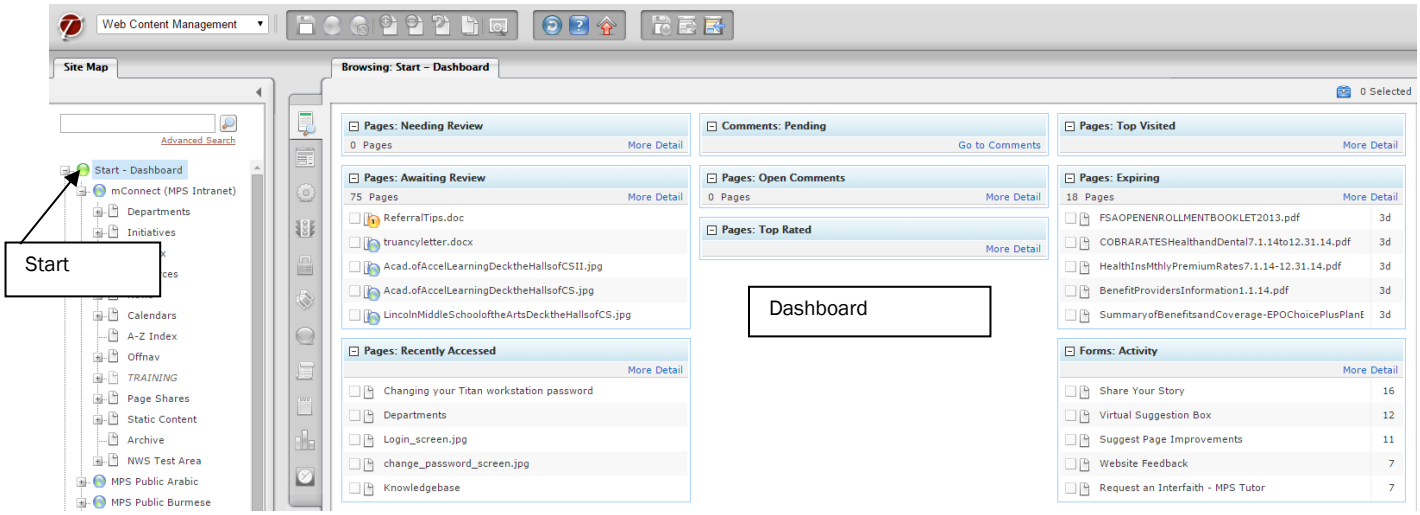

## Workstation Tour

This section will give you an overview of the common navigation and functions. All icons will display their function when you hover over them with the mouse.



# The TitanCMS™ Navigation Tree (Site Map)

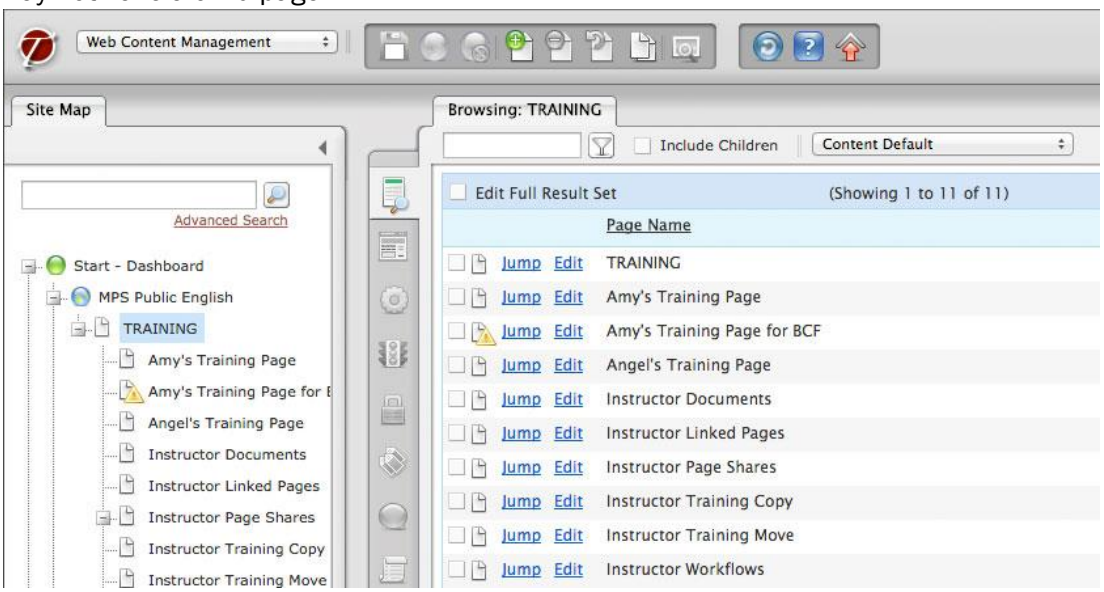
Upon logging into the TitanCMS™ Workstation, your cursor will be highlighted on the left on the "Start" (dashboard) view based on user login information.



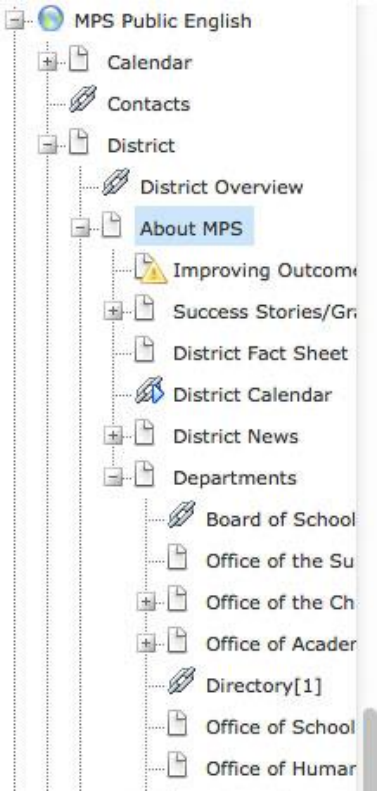

**In the Site Map (workstation tree), there are several types of icons:**

- This is a "content site" or "globe". Every website requires a globe.
- This is an icon representing a "standard" content page.
- This is an icon representing a "linked" page. The content does not reside on this page but it links to a page that has the content.
- This icon is used to represent a "file pile" folder. Images, PDFs, Excel, PPT, Word documents are stored in file piles.
- This icon represents a "data site"… also called "data node". Think of it as a database of structured records.

The left navigation frame of the TitanCMS™ workstation presents a tree structure. As pages are created, parent/child relationships are created. Depending on the page you are using as your reference point, you may or may not have a child page.



# Parent/Child Relationship




The following is an example of a parent/child relationship. In the example below, the About MPS page is a parent page with the following children:

*Success Stories/Graduate Profiles, District Fact Sheet, District Calendar, District News, Departments*

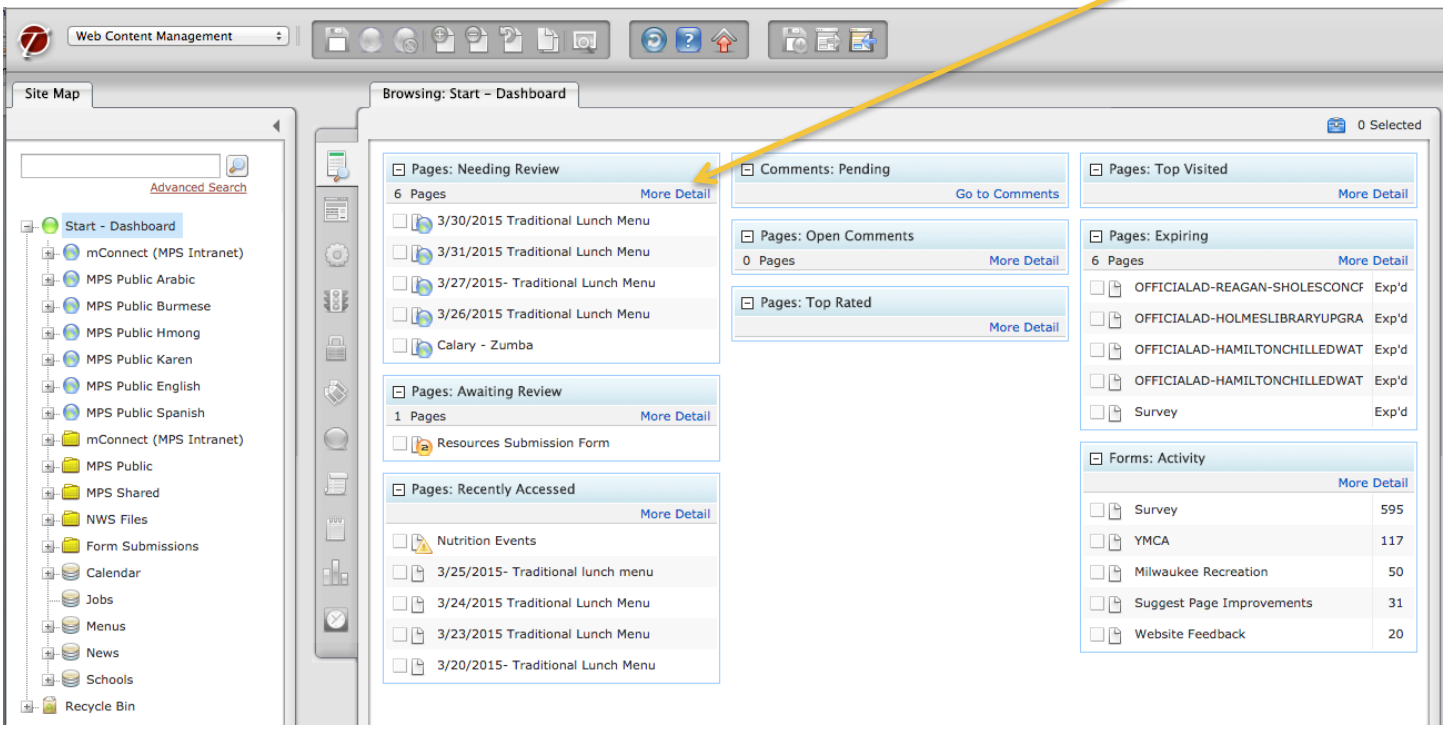
All pages under each of these children are also descendants of the parent. If Departments is your reference point, it becomes the parent with the following children:

*Board of School Directors, Office of the Superintendent, Office of the Chief of Staff, Office of Academics, Office of School Administration, Office of Human Capital, Office of Finance, Office of Innovation, Office of Operations, Directory*

1. Open the TRAINING section in the CMS Sitemap (nav tree). How many child pages are immediately under the TRAINING parent page?
2. Next, open the Instructor Page Shares section. How many immediate children are shown in the workstation tree? Note how you can continue to open the various levels within the tree…very similar to Windows Explorer behavior.

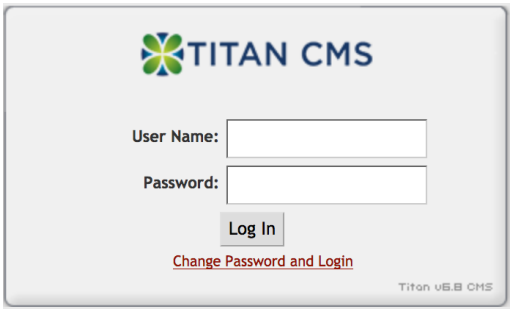
# The Workstation Dashboard

The dashboard results screen on the right will display pages recently accessed, pages needing review, pages waiting review, comments, top visited pages, and expired/expiring pages. Each dashboard section has a "more detail" link at the top right.




# Changing your Password

The Titan Workstation login display has a link to change your password "Change Password and Login".



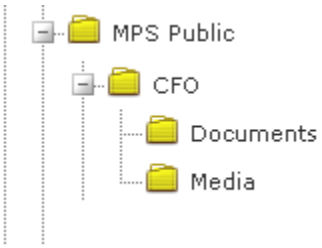

When you click on the link, you will see the following display. *Your new password must be a minimum of 6 characters.*


Click the Login and Change Password button when you have completed the information.

# Lesson B: File Piles

When using many of the Titan block types, your authors have the ability to insert images and link to images and documents.

The MPS Public file pile is the folder structure where your team stores all files (e.g., documents, images, etc.) that will be used on the website. Under the MPS Public and mConnect file piles, you will have access to your department file pile folder and two child folders: Resources and Media.

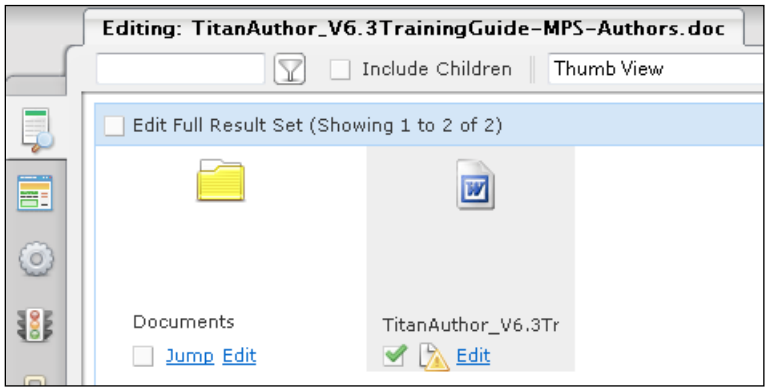



- **Resources**: Location of uploaded PDF, Word, Excel, Powerpoint, etc. files.
- **Media**: Location of images

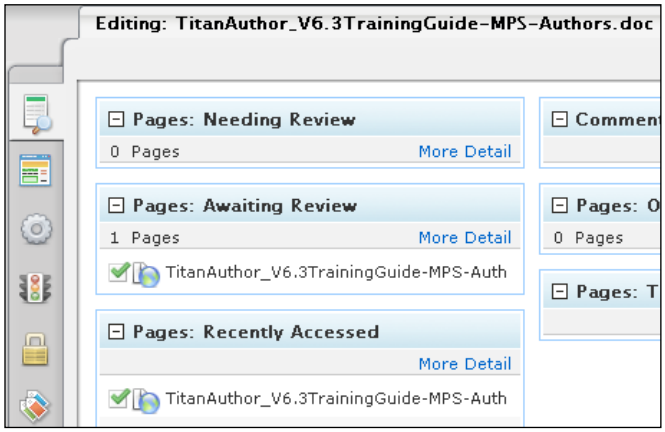
When your authors upload a file, you will need to review and approve its content before your author can make a hyperlink to the file within a Titan block.

## Workflow on an Uploaded File or Image

When your author uploads a PDF, Word, Excel, PowerPoint, or photo to the file pile, this is what they will see.

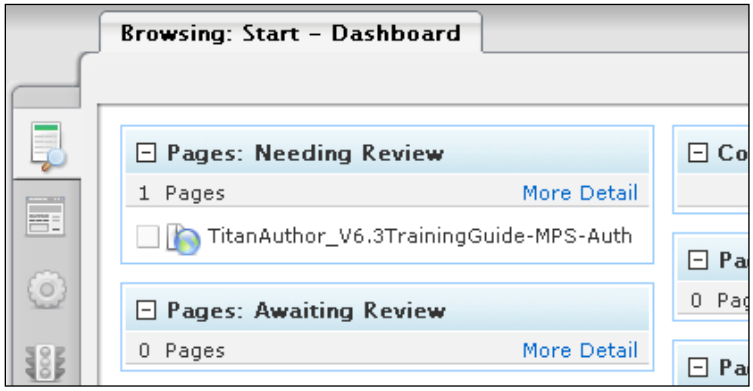



- In the example above, a Word document has been uploaded to the Resources parent folder.
- There is a gold triangle indicating that the file is in "editing mode". The author must publish the file to trigger workflow.
- On the Author's workstation dashboard, this file will appear under "Pages: Awaiting Review."



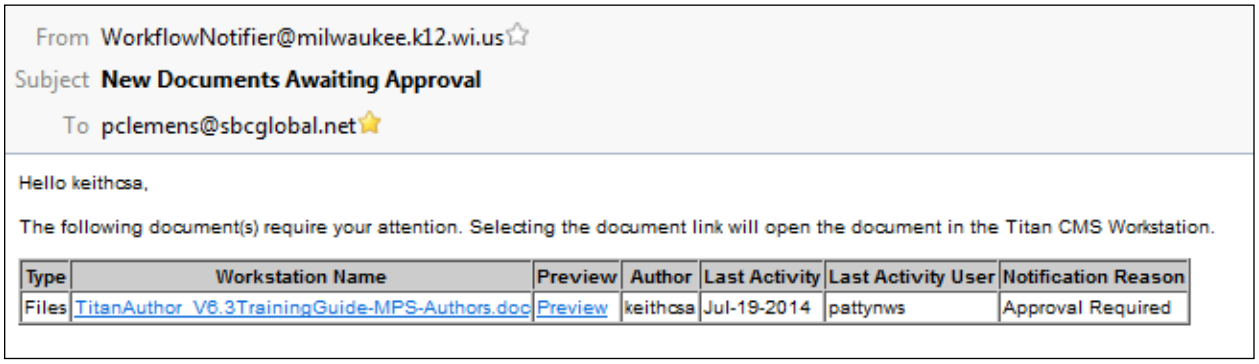

**Note the icon here does not have a number** – it looks like a "publish" icon sitting on top of the document icon. This indicates that it has entered the last step of workflow – one more publish will make it live.
*In most cases, the director is the final file reviewer of these file pile items.*

- If you are the next level of approval for this file, you should see it listed on your workstation dashboard under "Pages: Needing Review".




## How do I review documents or images in the file pile?

If you haven't had a chance to look at your Titan workstation dashboard, an email reminder will be sent twice per day. It will tell you the type of file you need to approve. The first column lists Type. In this example, it is Files. It tells you that Approval is Required for this file.

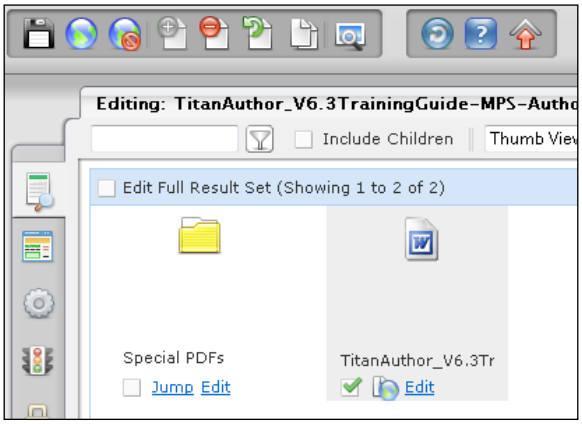

From WorkflowNotifier@milwaukee.k12.wi.us
Subject **New Documents Awaiting Approval**
To pclemens@sbcglobal.net

Hello keithcsa,

The following document(s) require your attention. Selecting the document link will open the document in the Titan CMS Workstation.

| Type | Workstation Name | Preview | Author | Last Activity | Last Activity User | Notification Reason |
|---|---|---|---|---|---|---|
| Files | TitanAuthor_V6.3TrainingGuide-MPS-Authors.doc | Preview | keithcsa | Jul-19-2014 | pattynws | Approval Required |

- Click on the Workstation Name link. If not logged in, you will be prompted to login to the Titan workstation. Upon successful login, Titan will take you to the file pile folder and select the file to be reviewed.
- Click the Preview button to view the document.
- If you decide to reject the file, add Notes first and then click the Decline icon.
- Otherwise, Publish the file.




The Author will see that this file is now in the "Pages: Recently Accessed" widget on the Dashboard. If approved, all workflow icons have been removed from the file and the file is available for use by the Author when creating and updating pages.

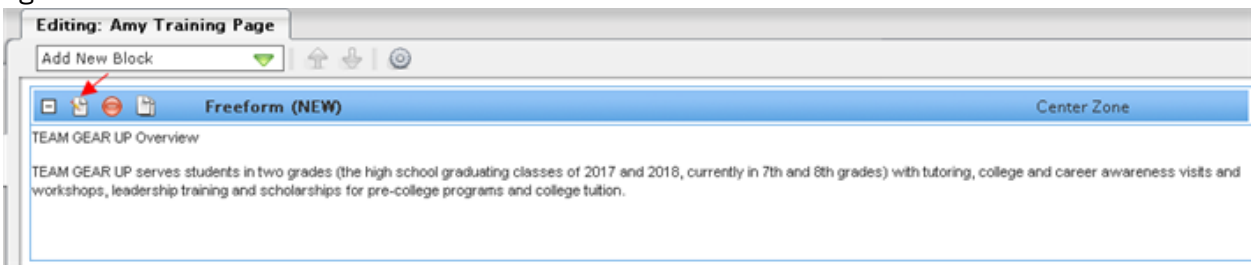
# Lesson C – Pages

The **Freeform** block is the most frequently used block type. The Freeform block uses a WYSIWYG -"What You See Is What You Get" editor allowing you to update your content with minimal technical skills. You can copy and paste, add text and graphics, and create links as simply as you would in MS Word.

## Editing a Freeform Block

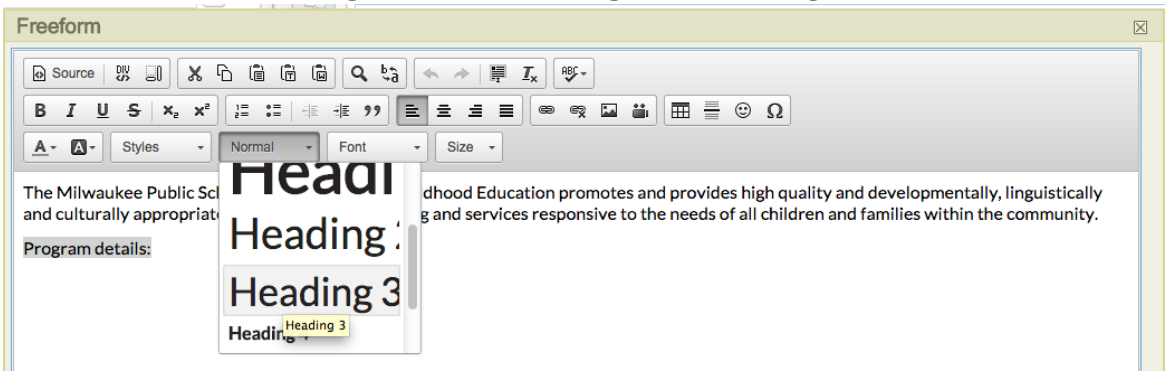
**When you are editing the author's page and you see a Freeform block that has a typo, how do you edit it?**

- Click on the "edit" icon in the block title bar or double-click the blue bar. The Freeform Editor will open once again.




- Let's review the editor's toolbar. Each of these icons is described in the Appendix of this document.


- Let's assume the author forgot to make a heading in the "Heading 3" so it stands out.




- Click OK to close the editor.
- Publish the page by clicking the  icon in the Page Action Bar and review your page on the website.
- As you review your author's content, check against the following list of guidelines for writing content that is both user-friendly and ADA-compliant.

# Writing for the Web and ADA-Compliant Guidelines

When writing your content:

- Reading level should be at the 8th grade level.
- Remember:  Web users scan; they don't read!
- Use meaningful headers; include keywords that you are targeting in the content below the header.
- Write short paragraphs; use bulleted lists for ease of reading.
- Use informative page titles (Maximum 55 characters)
- Order of navigation and text should be in a logical reading order to provide structural meaning.
- Avoid centering or right-justifying your text.
- Avoid justifying your text (where extra space is added automatically between words)
- Avoid underlining text (visitors will think it is a link).
- Words that may be unknown should be defined through related text or a glossary.
- Abbreviations should be defined the first time used.
- If the pronunciation of a word is vital to understanding that word, its pronunciation is provided immediately following the word or a glossary.
- The purpose of each link can be determined from your highlighted link text alone, or from the link text and its context.
- When creating your highlighted text for a link, avoid the phrase "click here".

### Images

All images (including linked images) should have Alternative Text or a more detailed description provided in the:

- Freeform block where the image has been placed
- Teaser Image Text (set in Properties).

If text related to the image is in the body text, no Alternate text is needed, though the two should be contextually related.

Decorative images or images whose content is already in the body text do not need Alternative Text.

### Audio/Video

- Audio and Video should have transcripts -  text on web page or a rich text format download.
- Audio and Video should have no or low background noise.

### Tables

Tables should be used for tabular data, not for content layout. Data table captions, column/row headers, and summaries should be used.

# Lesson D – Using Notes to Communicate Changes + Workflow

Your authors have been instructed to enter notes on pages and files as they create and edit these items. As editors, you will be reviewing the Notes before previewing their page. You will want to learn what has been changed and what you need to look at.

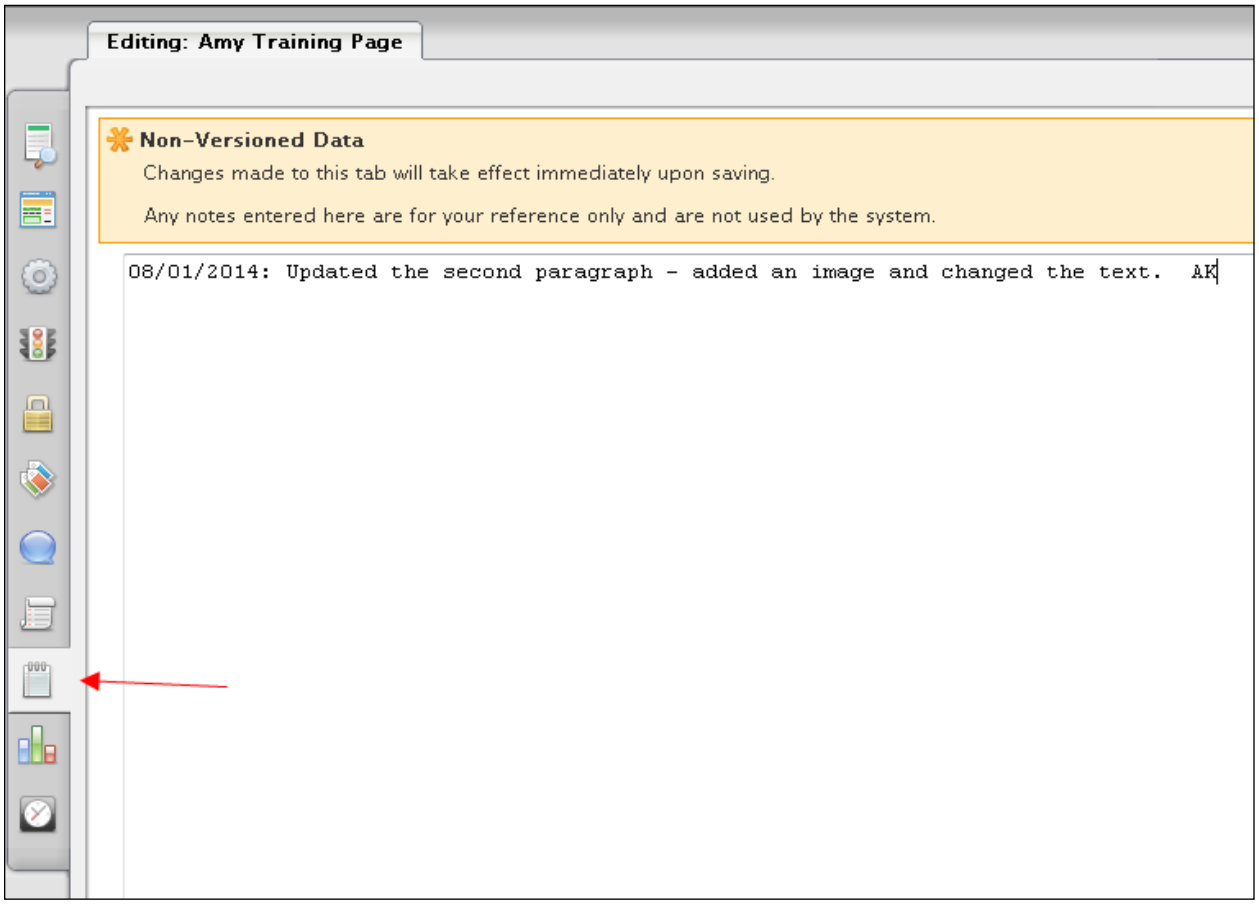
**Because your time is limited, these Notes will help you in reviewing only what you need to review.**

If you need to reject a page or file, you need to enter your notes so that the Author knows what needs to be changed. These notes will be invaluable to your authors.

If you are approving (e.g., Publishing) the page, you do not need to add Notes.

## Format of the Note

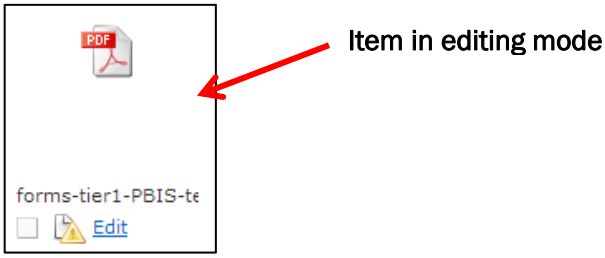
There is an Edit tab called Notes. While you are reviewing a page or file, you can go directly to the Notes tab. Provide the date, the reason for the rejection and what needs to be updated along with your initials.



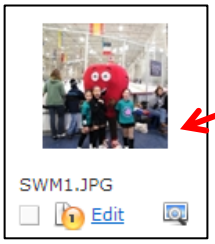
# Workflow is enabled for all items

Your supervisor and/or chief must approve all documents and images in the MPS Public file pile before they will be displayed on the site. The Webmaster must approve all documents and images in the MPS Shared file pile before they will be displayed on the site.

- Do not forget to **publish** your documents (click the globe in the page action toolbar ) to begin the workflow process.
- Any item in the file piles with the yellow triangle icon is still in editing mode.
- Items with a 1 or 2 golden marble are being reviewed.
- Items with a little globe icon are awaiting publishing by the final reviewer.




Item in editing mode




Item in workflow (awaiting editor 1's approval)

Most often, when someone asks why their document isn't appearing on mConnect even though they loaded it into Titan, the reason is that it was never published, and therefore never triggered workflow.

**Why is it important to document changes in the Notes Edit Tab?**

- It alerts the reviewer to any changes made to a document they've previously approved.
- It speeds up the length of time required for review and approval because they only have to look at the changed portion(s) of the page or document.
- It keeps a running tab of all changes to the document or page and who made the changes (which is especially helpful when multiple people have access to a particular page).

# Typical MPS Workflow Scenario for files

- Step 1: Author publishes a document.
- Step 2: Editor(s) within the department reviews and approves/rejects change. If rejected, it goes back to the Author.
- Step 3: Upon Editor's approval, the department director (or his/her designee) will review and provide final approval. The director's publish will cause the item to go live on the site.

# Lesson E – Workflow & Editor Responsibilities

Based upon your feedback, we have defined workflows for specific content that falls under your responsibility. Every page and file within the Titan workstation is assigned workflow.

## Workflow Overview

Workflow is the 4th edit tab and it shows the options available as well as the list of authors and editors of the content.

Workflow Options

- **No Workflow –** Author clicks the Save icon and the item becomes "Approved (Active)." This is not commonly used in MPS.
- **1-Step Workflow** – Author must click the Publish icon to make the item "Approved (Active)." This is not commonly used in MPS.
- **2-Step Workflow –** Author clicks Publish icon to trigger workflow. Editor reviews and publishes item to make it "Approved (Active)". Editor may decline the item.
- **3-Step Workflow** – Author clicks Publish icon to trigger workflow. Editor #1 reviews and clicks Publish to send the item to the 3rd step of workflow. Editor #2 reviews and clicks Publish to make it "Approved (Active)". Either Editor may decline the item.
- **4-Step Workflow** – Author clicks Publish icon to trigger workflow. Editor #1 reviews and clicks Publish to send the item to the 3rd step of workflow. Editor #2 reviews and clicks Publish to send the item to the 4th step of workflow. Editor #3 reviews and clicks Publish to make it "Approved (Active)". Any Editor may decline the item.

## Typical MPS Workflow Scenario at MPS

- Step 1: Author publishes page, uploads a file or updates a data node item.
- Step 2: Editor 1 within the department reviews and approves/rejects change. If rejected, it goes back to the Author.
- Step 3: Editor 2 or his/her designee reviews and approves or rejects the change. If rejected, it goes back to the Author.
- Step 4: Upon Editor 2's approval, the webmaster will review and provide final approval. The webmaster's publish will cause the item to go live on the site.

## How Do I Approve or Decline an Item?

- If you are declining the item, be sure to enter your Notes first.
- In the top Page Action Bar, you should see the following icons highlighted.

- The first globe will publish the item
- The second globe with the red cancel will reject the item

# How Do I Know When I Have Something to Approve?

Email notifications are sent twice a day - at 5 a.m. and 4:30 p.m. These email notifications will come from **WorkflowNotifier@milwaukee.k12.wi.us** with the subject line **Documents Awaiting Approval.** This email will list all of the items awaiting your approval.

Here is an example of one of these email notifications:

**New Documents Awaiting Approval**

WorkflowNotifier@milwaukee.k12.wi.us

Sent: Wednesday, June 1, 2016 at 4:30 PM

To: Kant, Amy

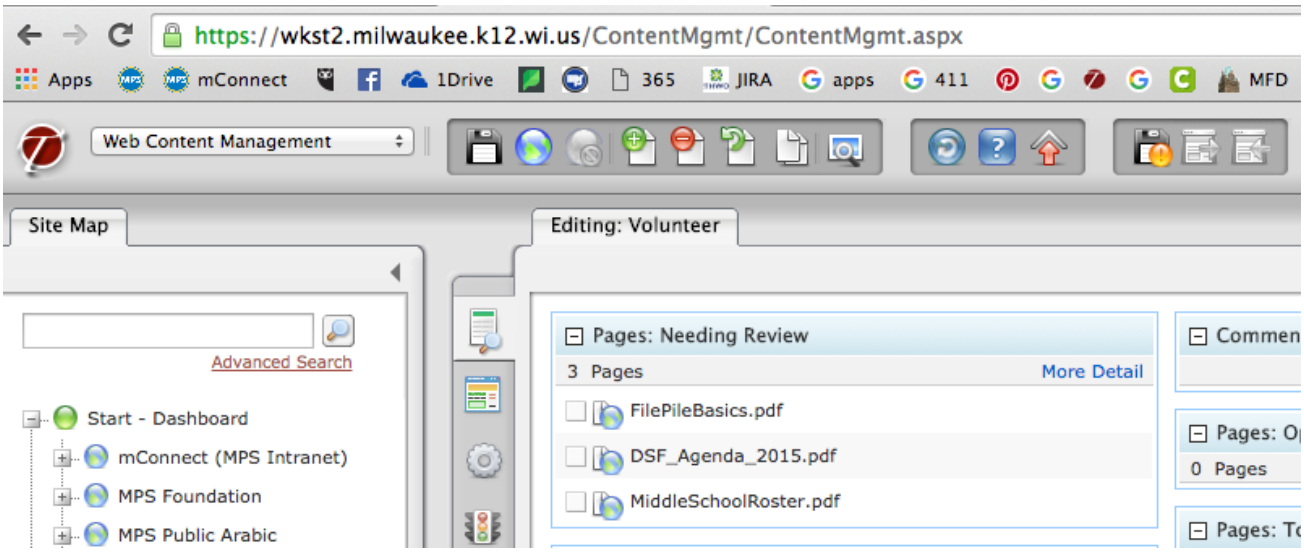
Hello amykant,

The following document(s) require your attention. Selecting the document link will open the document in the Titan CMS Workstation.

| Type | Workstation Name | Preview | Author | Last Activity | Last Activity User | Notification Reason |
|---|---|---|---|---|---|---|
| Data | Bruce School Graduation | Preview | Webmasters | Jun-01-2016 | public | Approval Required |
| Content | Trauma Sensitive Schools | Preview | Webmasters | Jun-01-2016 | ruthiz | Approval Required |

You can also log into the Titan Workstation at any time to view items awaiting your approval. Sometimes, one of your authors may ask you to review an item they recently published. You can access the Titan Workstation from the MPS Apps page or by visiting https://wkst.milwaukee.k12.wi.us.

Upon logging into the workstation, you will see the **Pages Needing Review** widget. This widget will list any items currently awaiting your approval.



# Appendix A: Common TitanCMS™ Vocabulary

### Block

A website page consists of one or more blocks. A block may consist of text, links and/or graphics.

### Block Type

A block is assigned a block type. The purpose of a block type is to enter content. When you click the Block Action Bar button to **Add a New Block**, the pull-down menu allows you to select a block type.

### Child

The left navigation frame of the TitanCMS™ workstation presents a tree structure. As pages are created, parent/child relationships are created. The following is an example of a parent/child relationship. Depending on the page you are using as your reference point, you may or may not have a child page. In the example below, the **About MPS page** is a parent page with the following children:

> *Success Stories/Graduate Profiles, District Fact Sheet, District Calendar, District News, Departments*

All pages under each of these children are also descendants of the parent. If **Departments** is your reference point, it becomes the parent with the following children:

> *Board of School Directors, Office of the Superintendent, Office of Communications and School Performance, Office of Academics, Office of School Administration, Office of Human Resources, Office of Finance, Directory*

### Classification

Pages, file and events can be tagged with classifications (tags) in order for different display options with in your site.

### Descendant

This term is used to reference all child pages below the parent (or self).

### Display Side

This references how the site will look to the "public" by accessing the site's URL

### Navigation Zones

These are defined for each page within the Properties edit tab. They indicate if the Page Name should be listed in the left, top, bottom, or utility navigation. The nav zones listed represent a all nav zones available across all of your page layouts.

### File Pile

The location on the server and in your workstation where all linked files and images reside. The File Upload process is used to copy files from your local network or your local drive directly to the file server through your workstation. A File Upload is required when any changes are made to a linked file or image in the File Pile. When a user clicks on a hyperlinked file or an embedded image file, TitanCMS™ retrieves the file from the File Pile and binary streams the file to the user's browser.

### Inheritance

The ability to automatically copy settings from the parent page to child/descendant pages.

### Linked Files

When a hyperlink is established within a block, this link may point to a file within the TitanCMS™ File Store. This is considered a linked file.

### Meta Data

This refers to the Metatag Keywords, Metatag Description, Page Name, Short/Long Teaser fields. They are setup by the Author when the page is created.

### Module

There are five administrative modules within the TitanCMS™ workstation. They are Web Content Management, SmartSearch, Commenting Workstation, User Management and Titan Administration.

### Page

A page within the TitanCMS™ workstation may contain content built with blocks or it may link to other content (for example, a file in the file pile or an external page).

### Page Name

This is the page name that will appear in the Navigation Zones on the public side of the website.

### Parent

The left navigation frame of the TitanCMS™ workstation presents a tree structure. If pages are created under an existing page, a parent/child relationship has been created.

### Tree

This is another name for the Site Map. On most pages within the TitanCMS™ workstation, in the left pane, will be a listing of objects displayed in a tree structure, similar to a file structure used in Windows Explorer. You can use the "+" and "-"buttons to expand to minimize the nodes in the tree.

### Tags

Once your classifications are set up and made active in Titan Administration, you can assign tags and their attributes to pages, files and events. This allows gathering content from different nodes within the navigation tree for presentation to the website visitor.

### Version

Every page is automatically assigned a version number of 1 when it is created. As updates are made to a published page and a Publish occurs, the version number will be incremented. You may view the version history for a highlighted page by selecting the Version History Edit tab.

### Webmaster

The webmaster of the site is usually the user that handles most of the administration of the TitanCMS™ sites. There are different levels of security that can be applied to each user. The Webmaster usually has full administrative rights to the system. This user guide will also refer to webmaster groups and users. Unless otherwise specified, when we refer to the webmaster throughout this user guide, we are referring to the main administrator of the website, who will have their own User Profile.

### Workflow

When a page is created, updated or deleted, it can be assigned a workflow type. Authors can author a page or pages and Editors can approve, publish, or decline pages. Workflow defines the approval and notification flow prior to publication.

### Workstation

The TitanCMS™ workstation is the administrative interface for your website(s).

### Workstation Name

This is the object name that appears in the TitanCMS™ navigation tree. It is usually the same as the Page Name; however, it can be changed.