

~ Town of Norfolk ~

Website Content Management System

Prepared for Town of Norfolk (May of 2018)

This document is intended for technology administrators

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Chapter 1

Overview

The Town of Norfolk's website is powered by the open-source content management system (CMS) currently known as Evolution (www.evo.im). It was previously known as MODX Evolution until MODX LLC handed off the project. It began development in 2004 and as of writing this documentation, Evolution remains an active open-source project with constant upgrades, additional features and improved security (current version 1.4.3).

The core structure of Evolution has always remained the same but the interface and plugins have continued to evolve. One helpful new feature is the built-in "upgrader" that will alert administrators when there's a new version available and provide an "easy install" button to automatically begin the update process.

While it is recommended to apply updates, always use caution as they may introduce an unexpected issue. Without an in-depth knowledge of Evolution's underworkings and/or web development this can pose a challenge and why it is important to take advantage of the backup module (discussed further in another chapter).

Detailed documentation of the Evolution CMS:

<http://www.evolution-docs.com/documentation/>

Chapter 2

Elements

Norfolk's website has been created in such a fashion as to limit the need for editing any of the system elements that control what and how content is handled. These include Templates, Template Variables, Snippets, Plugins, etc.

On occasion, the **Chunks** element area may need to be accessed. Chunks are just that, a chunk of code (HTML) for the website to display.

The following chunks may need to be edited in the future (when viewing the Chunks tab in the CMS, a brief description is provided for each);

- Contact_Board_of_Selectmen_form
- copyright
- footer
- site-links
- social

Chapter 3

Permission Groups

There are two permission types within the CMS. **Manager permissions** and **Web permissions**. Web permissions are an *unused* component for Norfolk and should be ignored.

When the website was initially setup, all resources' **Access Permissions** were set to **Admin** to lock down all resources. As departments and other entities need access, they will need to have a separate permission group(s) created and then applied to the their resource(s).

Permissions are broken into **User Groups** and **Resource Groups**. By separating these two areas, the CMS allows a greater control over what users are associated with what resources. There is no limit to the number of permission groups that may be associated with a resource and/or user, allowing for overlapping of groups.

The most common and simplest way of setting up permissions is to do a 1:1 association.

To create a permission group called “Technology” for our future “Test” user we will create a User Group named **Departments - Technology** and a Resource Group named **Departments - Technology**.

Manager access permissions ?

< USER GROUPS RESOURCE GROUPS USER/RESOURCE GROUP LINKS >

View the User Groups that have been created. You can also create new groups, rename groups, delete groups and see which users are members of the different groups. To add a new user to a group or to remove a user from a group, edit the user directly. Administrators (users who have been assigned the role with ID 1) always have access to all Resources, so they don't need to be added to any groups.

Create a new User Group

Departments - Technology Submit

Manager access permissions ?

< USER GROUPS RESOURCE GROUPS USER/RESOURCE GROUP LINKS >

See which Resource Groups have been created. Also create new groups, rename groups, delete groups and see which Resources are in the different groups (hover over the id of the Resource to see it's name). To add a Resource to a group or remove a Resource from a group, edit the Resource directly.

Create a new Resource Group

Departments - Technology Submit

On the **User/Resource Group Links** tab we will link these two groups so that the user(s) in our new user group have access to the resource(s) in our new resource group.

Manager access permissions ?

< USER GROUPS RESOURCE GROUPS USER/RESOURCE GROUP LINKS >

Specify which User Groups are given access (i.e. can edit or create children) to the Resource Groups. To link a Resource Group to a User Group, select the appropriate groups from the drop down menus, and click on 'Submit'. To remove the link for a certain group, press 'Remove'. This will immediately remove the link.

Create a new group link

Link User Group Departments - Technology to Resource Group Departments - Technology Submit

If you review the user and resource groups that we created, you will note that **Users in group: None** and **Resources in group: None** appear. This is normal, as the next chapters will explain how to add users and resources to these new groups.

Chapter 4

Users

There are two user types within the CMS. **Manager users** and **Web users**. Web users are an *unused* component for Norfolk and should be ignored.

Almost all users will either have a user role of **Administrator** or **General Content Editor**. At some point in the future, you may find that you need to create a new user role that provides more or less access. For example, you may want to give a user the ability to only edit pages, not create or delete. Another possible scenario is preventing a user from uploading images or files. User roles are configured under **Users > Roles**.

Tip | Administrators automatically have full permission to everything

Previously, in Chapter 3 we setup new permission groups for users and resources. Now it's time to create a new user and add them to the new group.

Under **Users > Manager Users** we will click **New Manager User**

You can use either method of password creation, depending on your preference, and you can directly send the user an e-mail notification or show it on the screen only for you.

Provide the **Full Name** of the user, an **E-mail address** for that user and the **User's role** (most commonly "General Content Editors").

The last field(s) that need to be set are under the **Access Permissions** tab. Select the **User Group(s)** you wish to associate this new user with. In this example, we're choosing *Departments - Technology*.

Save the new user to finalize the creation.

Chapter 5

Resources (permissions)

In Chapter 3 we created permission groups for users and resources. In Chapter 4 we created a user and added them to the new user permission group. Now it's time to add resources to the new resource permission group for our user to access.

There are two ways to handle resource permissions. The first, is to go directly to a resource in the resource tree and edit the resource. Choose the **Access Permissions** tab and check off what resource group(s) you would like this resource to be a part of. Be sure to save the document once you've checked off the group(s). Do this with every resource as needed.

The second way is by using the powerful **Doc Manager**. This feature is further explained in Chapter 10. The advantage of the Doc Manager is you can change resource permissions for multiple resources at once. This is helpful if you need to change permission for all the resources under a specific department.

Using the **Doc Manager**, choose the **Document Permissions** tab. Choose a single resource permission group, choose whether you're adding or removing it from the group and then specify the range of document IDs you are changing. Remember to click **Submit** when done.

Chapter 6

File Management

The system configuration page allows administrators to configure the file, image, media and flash formats that users can upload. The default settings are the recommended "safe" formats and you shouldn't have to worry about changing them.

Tip | When files are uploaded, the CMS automatically performs 'transliteration' to clean special characters, replace spaces with hyphens and convert to lowercase.

All files uploaded are stored under **assets > files**, all images uploaded are stored under **assets > images** and media (videos) are stored under **assets > media**.

The CMS keeps files, images and media (videos) in separate folders. As such, it is highly recommended to maintain a similar folder structure for all. The current folder structure has been created to mirror the website's resources (pages). Since not all departments have images and/or files uploaded, their folder will have to be created when the need arises. Any user (with access to upload) may create subfolders in the "KCFinder" file viewer by right clicking the parent folder that the subfolder is to be created under.

It is imperative that all users keep uploaded files organized and to remove anything that is considered outdated. The more "outdated junk" that remains, the harder it is for editors to work with files and performing full backups will take longer.

Manage Files

Administrators have access to the **Manage Files** tab located under **Elements**. This is a root directory view of the files on the server and is a simple alternative to using FTP software to upload or manipulate the core files. ***Please use caution as these files are for everything, including the files that power the manager!***

Chapter 7

Performing Backups

While images and documents are important, the CMS database stores all the actual content of the website. **If you lose the database you lose your website.**

Tip | Never rely on your hosting provider for backups as they make no guarantees they'll be able to recover from a disaster, even of their own making.

Built-in Database Backups

The CMS has a simple built-in database backup utility located under **Tools > Backup** tab.

While this tool is "simple" it is by no means useless. This tool enables you to download the database to a local disk, restore from a previously downloaded database file and includes a helpful snapshot feature for instant backups and restorations.

As an administrator, you must use your own judgement as to how often and in which way you want to backup the database.

EvoBackup Module

EvoBackup is an additional module that has been installed in the CMS. This module offers more backup options beyond the built-in database backup utility and provides the foundation for an automatic backup component.

EvoBackup has the ability to automatically backup any archive level. However, performing a “Light Backup” will produce a backup archive that is over 1GB in size and takes a few minutes to process. As such, this should only be performed manually and as needed.

As an administrator, you must use your own judgement as to how often and how much you want to backup.

Note | Full site backups should be performed before an upgrade but choosing “Full Site Backup” may take a long time to perform and potentially fail. An alternative is to manually backup individual sections such as User Folders as one backup, Elements folders as another, etc.

AutoEvoBackup Plugin

The AutoEvoBackup plugin works with the EvoBackup module and provides an automatic way to perform a backup. At this time, it does not have a scheduling feature and relies on manager actions (On Logout, On Save, On Login, etc) to initiate the process.

Due to the sheer size and server load that backing up all files requires (over 1GB just for user files), it's recommended to only do automatic updates of the database. The database is usually small enough that the process completes almost instantly.

The plugin has been configured to run a backup of the database when a manager user logs in and retains a maximum of 20 backups on the server at any given time. These database backups are available under the built-in **Tools > Backup > Snapshot Save and Recovery** tab.

To change settings of the AutoEvoBackup plugin please go to the **Plugins** tab, **AutoEvoBackup** plugin and then view the **Configuration** tab.

Chapter 8

Updates

Be sure you've performed a **full** backup!

Updates will unpack new files to the server (overwriting the old ones) and provide an installation interface to complete the process. If an update fails to forward you to the installation interface, you can manually access it by going to <http://norfolk.ma.us/install/>

Follow the onscreen option to perform an upgrade and leave all install settings defaulted to what is selected.

After an update is completed, the **System Configuration** tab will automatically appear when you login to the manager. Click **Save** and the system will perform a final cleanup process.

After doing an upgrade, confirm the following:

Plugins > TinyMCE > Configuration Tab

Custom Style Formats RAW: (BLANK)

Custom Style Formats INLINE: (BLANK)

Custom Style Formats BLOCK:

Attention Box,attention|Alert Box,alert|Help Box,help|Info Box,info|Button,button

Custom Parameters:

toolbar_items_size: 'small', body_id : 'content', table_default_attributes: { 'border': '0' },

Force Paste as Text: enabled

Chapter 9

News

- All news is contained under the **News** container in the resource tree
- Regardless of the order the news items appear in the manager, the system will always present them on the home page by the date/time they were published
- There are (3) options to choose from - Link, Posting & Article
- You may add a "News Image" to any of these items, and it will automatically be converted into a small thumbnail to accompany your news on the home page
- Because each news item is like any other resource in the manager, a publish/unpublish date may be set to automatically post or remove your news.
- **Be sure to keep things tidy by deleting old news!**

Creating A Link

- To create a link, right click **News** and choose **Create Weblink here**
- Give it a title based on what the item is
- If this is a website URL, copy and paste into the **Weblink** field. Otherwise click **Insert** and upload and/or choose the file you would like to link to
- Click **Save**

Creating A Posting

*Postings are for quick notices. Long paragraphs should **never** be used here. You may include links within the posting.*

- To create a posting, right click "News" and choose "Create Resource here"
- Give it a title based on what the item is
- Type your message in the main content field
- Click **Save**

Creating An Article

News Articles are meant for very long documents. They may be any length and can include photos that will appear on the full article page. You may treat this page like a normal webpage. The system will automatically show a limited amount of text and provide a "continue reading" link.

- To create an article, right click "News" and choose "Create Resource here"
- Give it a title based on what the item is

- Type your message in the main content field
- Under the "News" block, for the field "What kind of news is this?" select "News Article" (default is set to Posting)
- Click **Save**

Chapter 10

A Note About Administrator Level Features

Full Access

Regardless of whether "Admin" is set under a resource's permissions, administrators have full access at all times to every resource in the CMS.

Resource Deletion

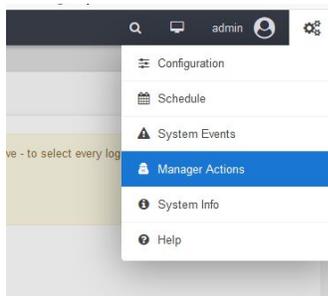
The ability to "Permanently purge deleted Resources" is disabled for the General Content Editor role. This is to prevent accidental deletion as once a resource is purged, it's permanently gone. Since different users may delete a resource and someone may decide to immediately purge their deletion, this would purge any and *all* deleted resources preventing some users the chance to realize and correct their mistake. By shifting this power to administrators only, purging can be done at intervals as well as confirming what resource(s) is waiting to be purged.

When there are resources to be permanently deleted, the trash icon will become active.



(icon is inactive, nothing to purge)

Confirming resources to be deleted



The CMS has a log of all **Manager Actions** under the **System Settings** tab. This gives administrators the ability to see what resources have been deleted and by whom.

User	Any/All
Action	Any/All
Item ID	Any/All
Item name	3 - Viewing data for resource
Message	4 - Creating a resource
Date from	5 - Saving resource
Date to	6 - Deleting resource
No. of results	8 - Logged out
	11 - Creating a user
	12 - Editing user
	13 - Viewing logging
	16 - Editing template

The quickest way to check deleted resources is by choosing **Deleting resource** from the **Action** drop down and then doing a search. The results will show what documents have been deleted, by whom, when, etc. You may also view these deleted documents to confirm if they should be permanently deleted.

Drag & drop resources in the resource tree

Administrators have a convenient feature that allows dragging and dropping resources around the resource tree. This allows you to quickly change the order of the list and even move entire containers to new locations. Due to the inherent danger of accidentally moving large groups of resources, the system only allows this with the administrator role.

Remove Locks

When a manager user is viewing or editing a resource, their account “locks” that resource. On occasion, if a user doesn’t exit a resource once they’re done or the system fails to unlock it, administrators can force unlock all resources by clicking **Remove Locks** under the **Tools** tab.

Doc Manager

The Doc Manager is a powerful bulk editor that enables administrators a streamlined way to change specific options of single or multiple resources. Options include templates, template variables, permissions, publish dates and more.

You must know the ID number of the resource(s) you want to change. Further instructions on how to use the ID number and/or range of ID numbers is provided under the **Specify a Range of Document IDs** field.

Specify a Range of Document IDs

Key (where n is a document ID number):

- n* - Change setting for this document and immediate children
- n** - Change setting for this document and ALL children
- n-n2 - Change setting for this range of documents
- n - Change setting for a single document

Example: 1*,4**,2-20,25 - This will change the selected setting for documents 1 and its children, document 4 and all children, documents 2 through 20 and document 25.