

## CrownPeak CMS: Quick Start Guide

This document provides a quick reference to the CMS interface. It also presents an overview of the key system concepts you will need to understand before logging into the CMS for the first time.

Keep in mind the document is only intended as an initial quick start document. For more detailed information and assistance on using the CrownPeak CMS system, please refer to the *CMS User Guide*, available via the Help menu in the CMS system.

### Login/Logout

**Login URL:** `http://advantage[n].crownpeak.com/[clientname]`

**Username:** [Your CrownPeak Client Services Representative will provide you with this]

**Password:** [Your CrownPeak Client Services Representative will provide you with this]

Log in by going to the CMS URL for your installation and using the username and password assigned to you.



The screenshot shows a login form with a blue header bar containing the text "Please provide the system with your login information". Below the header, there are two input fields: "Username:" and "Password:". Under the "Password:" field, there is a checkbox labeled "Remember my username and password in this browser (cookie)". Below the checkbox, there is a link that says "Forgot your password ... click here!". At the bottom of the form, there are two buttons: "Submit" and "Cancel".

Once you are in the application, what you see in the navigation menus is determined by the permissions granted to your group. Everything you need to create and input content, manage users and access (if you are an admin user), or manage templates (if you are a developer user) should be available to you. If not, contact your organization's CMS Administrator.

### Changing Your Password

Your assigned password is a default password that you should change as soon as you login for the first time. To change your password, perform the following steps:

1. Login to the CMS.
2. Choose System > My Account > Edit from the CMS top navigation menu.
3. Change your password using the provided fields.
4. Save your changes.

**Note:** For more information on login and account preferences, please refer to the Procedures section in the *CMS User Guide*. The guide is available in the Help menu of the CMS application.

## Navigation

### Left Navigation



← Your avatar is displayed here

In the left-hand navigation interface, you have access to your home page, preferences, summary information and other listings, as well as a logout link. You can also see which users are currently using the system.

### Top Navigation



This navigation bar is always visible when you are in the CMS. The submenus are context-sensitive and change based on access and group permissions—but these five navigation items will always be available:

**File** – Allows you to access content folders, create new items, search and view live and staging sites

**Edit** – Displays state of current document. Submenus display actions available in current state

**View** – Allows you to see preview of and folders associated with the current document. Also gives access to document properties, versions, and comments

**System** – Provides access to account settings and system information.

**Help** – Provides access to the Help system, and contains support information.

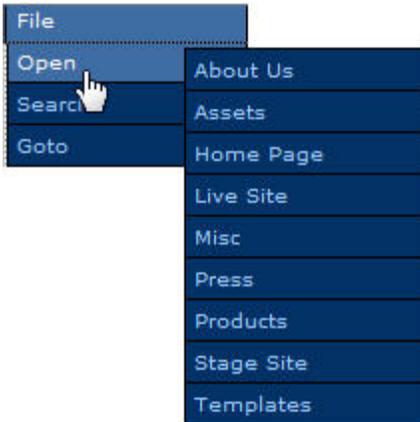
**Note:** For more information on the top menu items, please refer to the Menu Item Reference section in the *CMS User Guide*. The guide is available in the Help menu of the CMS application.

## Finding an Asset

There are several ways to locate an asset in the CMS. Here is the most basic way:

1. Choose File > Open.

This reveals a submenu of all the site sections to which you have access (again, based on how permissions are set for you and your group).



2. Click on the desired location.

You are taken to the selected folder. The folder view will show you all of the assets contained within it.

## Selecting and Viewing an Asset

When in the folder view, you can select an asset by clicking on the asset's label, status, or any of the fields list in the row.

Type	Label	Status	Changed By	Size	Changed On
Folder	Jobs		CrownPeak Admin	3	7/22/03 17:56:17
Asset	Board of Directors	LIVE	Denise Duncan	196 B	1/26/04 18:41:45
Asset	Index	STAGE	Editor User	141 B	3/1/04 17:40:31
Asset	Management Team	DRAFT	CrownPeak Admin	106 B	7/22/03 17:53:48

- Right-click on an asset to expose a menu specifically for that asset.
- Click on the asset's icon to display a preview of the page in the browser.
- You can navigate through the CMS using either the folder view or the preview mode.

**Note:** For more information on finding, selecting, and viewing assets, refer to the Assets, Documents, Files section in the *CMS User Guide*. The guide is available in the Help menu of the CMS application.

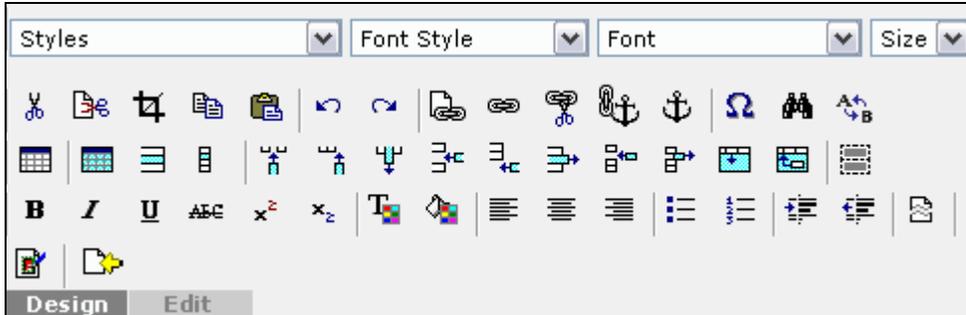
## Creating a New Item

To create a new page, select File > New. This reveals a submenu of items that you can create in the current folder.

- If the item is a folder, select it to display a JavaScript prompt to enter the name of the new folder.
- If the item is a page, or something that requires input, select it to display a form.

## Using a WYSIWYG Editor

Some input forms include WYSIWYG editors. These editors allow you to import HTML directly from your existing Web site, or you can use the buttons to input HTML for tables, images, etc.



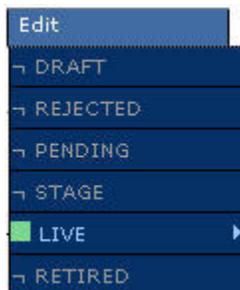
The WYSIWYG editor is useful for previewing HTML before saving the content.

**Note:** For more information on the WYSIWYG editor, refer to the WYSIWYG Editor section in the *CMS User Guide*. It is available in the Help menu of the CMS instance.

## Editing Content

To edit an item, select it in the folder view by clicking on it. You can then right-click and select **Edit** from the menu (or you can go to the Edit menu in the top navigation).

From there, you can see all of the possible document “states,” with the current state being the active item in the list.



Select the current state to expose a submenu with editing and publishing options for the item.

## Workflow

As mentioned before, documents travel through different states in the workflow before being published. The structure of the workflow depends on the needs of your organization.

## General Tips

### Right-Click

Right-click to expose a context-sensitive menu.

### Refreshing a Page

It is best to right-click and select **Reload** from the menu (or click the **Refresh** icon at the top of the folder list). If you use your browser refresh button, you may find yourself bumped out of the CMS.

### Back

It is best to right-click and select **Back** from the menu. If you use your browser back button, you may be returned to an expired page. If that does happen, right-click and select **Refresh**.