



eCalendar workflow

Editor

Approver

Coordinator

Coordinator 2

Copy Editor

Managing Editor

Overview of roles

Editor:

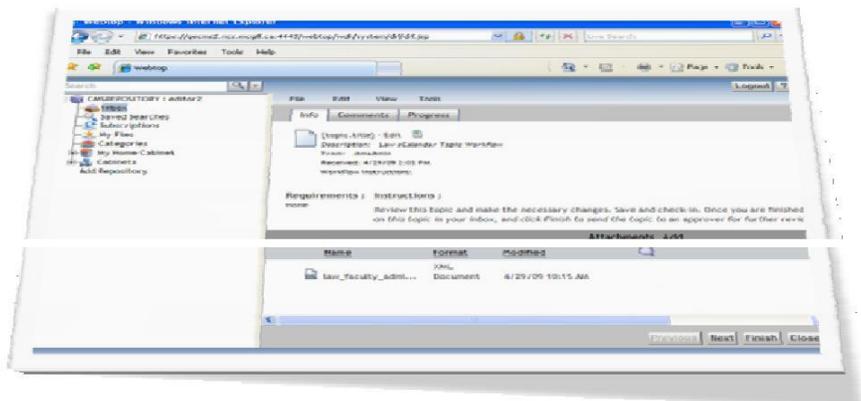
1. Receive email notification indicating that you have an eCalendar task in your Webtop inbox;
2. Log into Webtop (<https://cms.mcgill.ca/webtop>) using your McGill username & password;
3. In Webtop, click "Inbox", then double-click the task;
4. Right-click > select *Edit* on filename (see "Task View" below);
5. Review and modify document's contents as needed, referring to the eCalendar website for context;
6. "**Save**" and "**Check in**" the document, leaving comments in the Description field describing your changes;
7. Repeat steps 3–6 as necessary;
8. Once the file is ready, click **Finish** to submit it to the Approver.

Approver:

1. Receive email notification indicating that an eCalendar task has been forwarded to you by the Editor;
2. Log into Webtop (<https://cms.mcgill.ca/webtop>) using your McGill username & password;
3. In Webtop, click "Inbox", then double-click the task;
4. Right-click > select *Edit* on filename (see "Task View" below);
5. Review and further modify document's contents as needed, referring to the eCalendar website for context;
6. "**Save**" and "**Check in**" the document, leaving comments in the Description field describing your changes.
7. Repeat Steps 3–6 as necessary.
8. When the file is ready, click **Forward** to submit it to Coordinator.

Webtop Inbox – Task View

<https://cms.mcgill.ca/webtop>



Webtop Inbox – Checklist:

- ✓ Double-click on the task to read the instructions and see topic filename.
- ✓ Right-click the filename listed in the "Attachments" frame and select **Edit**.
- ✓ Review & edit contents as necessary, then File > **Save** and File > **Check In**.
- ✓ Before forwarding the document to the next person, ensure that all desired changes have been made, saved, and "checked in" to the system.
- ✓ If you see a key icon beside the document filename, right-click on it and select **Check In** from the pop-up menu, leaving any comments about changes made to the contents in the "Description" field.

XMAX (editing software used for topics in Webtop)

Commonly used elements: For more details on how to insert the following elements, we have provided the page # from the *eCalendar User Guide*:

From the Element list pane:

- Paragraph <p> (p.28)
- Formatting elements:
 - Bold (p.28)
 - Italic <i> (p.28)
 - Citation <cite> (p.28)
- Note <note> (p.29)
- Lists:
 - Simple list <sl> (p.29)
 - Unordered list (p.29)
 - Ordered list (p.30)
- Title <title> (p.31)
- Long title <ltitle> (p.31)

From the Table menu

- Table <table> (p.30)

From the Insert menu:

- Comment (p.31)
- Linking:
 - Cross references (p.32)
 - Web link (p.32)
 - Email (p.33)

XMAX checklist:

- ✓ **Save** your document often (*File > Save*)
- ✓ Use Undo feature if you make a mistake (*Edit > Undo* or *Ctrl+z*)
- ✓ **Save & Check In** when you are finished working on a document for the day, to save your progress in the system (*File > Check in*)
- ✓ If you're unsure how to add a specific element or formatting, *leave a detailed comment (Insert > Comment)*; ES staff will add it for you.

Style Guide

The eCalendar style guide, a list of university abbreviations, and the complete *User Guide* are available at:

www.mcgill.ca/es/ecalendar-project/ecalendar-procedures.

Installation requirements

The following installation steps are for Internet Explorer 7 to 11 and are required before using Webtop or the XMAX editing software: ([IT KB article # 1447](#))

I. Add the Webtop URL to your browser's trusted sites.

1. From the IE menu, click **Tools > Internet Options**.
2. Go to the **Security** tab and click **Trusted sites** from the box at the top labeled **Select a zone to view...**
3. Click the **Sites** button.
4. Type in the URL **https://cms.mcgill.ca/** and click **Add**.
5. Click **Close** and click **OK**.

II. Set the security settings to Low for trusted sites, to allow the ActiveX control to run.

1. From the IE menu, click **Tools > Internet Options**.
2. Go to the **Security** tab and click **Trusted sites** from the box at the top labeled **Select a zone to view...**
3. IE6&7: Click **Custom level...** at the bottom of the window
 - a. At the bottom of the dialog, in the dropdown labeled **Reset to**, select **Low**
4. IE8: Adjust the security slider to **Low** in Security Level for this zone
5. Click **OK** on the **Security Settings** dialog
6. Click **OK** again on the **Internet Options** dialog.

III. If you have the Pop-up Blocker turned on, add the Webtop URL to your browser's list of pop-up exceptions:

1. From the IE menu, click **Tools > Internet Options**.
2. Go to the **Privacy** tab.
3. If the **Turn on Pop-up Blocker** check box is not checked you don't need to continue; just click **Cancel**. Otherwise, click **Settings** in the Pop-up Blocker area at the bottom of the dialog box.
4. Type in the URL **https://cms.mcgill.ca/** and click **Add**.
5. Make sure the **Filter level** at the bottom of the dialog is set to "**Low: Allow pop-ups from secure sites**".
6. Click **Close** and click **OK**.

Note: Once you have made these changes, close your browser and reopen it for the new security settings to take effect.

Contact information:

- Questions about the eCalendar process, Webtop, and XMAX: contact ecalendarsupport.es@mcgill.ca
- Login and technical issues: contact IT Customer Services at 514-398-3398 or itsupport@mcgill.ca