eCalendar User Guide

This manual is a training guide for eCalendar reviewers and users.
Content Management System: Webtop / Editing Software: XMAX

Table of Contents

eCalendar User Guide

Training guide for eCalendar reviewers and users

Overview of CMS?

What is a Content Management System (CMS)

A *content management system* (CMS) is system designed to help manage and access various types of content. Organized in a clear and intuitive structure, a CMS can *ensure that the most accurate and up-to-date information is easily accessible and regularly reviewed and updated*. The content management system we use to store eCalendar information is called **Webtop** (Documentum).

eCalendar content stored in Webtop goes through the following life cycle:

Webtop also manages the *properties* of each file; controls access to content based on *user permissions*; and enforces *business rules* and regulatory requirements. Webtop can be accessed online at https://cms.mcgill.ca/webtop.

Browser Requirement

Webtop requires Internet Explorer version 7-11 for full functionality.

XMAX, the editing software associated to Webtop, requires Internet Explorer version 7-11 for full functionality; it does not work in any other browser.

Installation Requirement

The following installation steps are for Internet Explorer 7-11 and are required before using Webtop or XML document in XMAX:

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

1. From the IE menu, click **Tools > Internet Options**.
2. pGo 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.**
6. Click **OK**.

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. Click **Custom level...** at the bottom of the window.
4. At the bottom of the dialog, in the dropdown labeled **Reset to:** select **Low** (This is the Default level for IE 6).
5. Click **OK** on the **Security Settings** dialog.
6. Click **OK** again on the **Internet Options** dialog.

If Popup-Blocker is 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.
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.**
7. Click **OK**.

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

Users running Internet Explorer 11 also need to turn on Internet Explorer's "Enterprise Mode" setting:

1. Refer to http://kb.mcgill.ca/#tab:homeTab:crumb:8:artId:7326:src:article for instructions on how to turn on Enterprise Mode.

Understanding the eCalendar workflow

During review periods, eCalendar topics go through a *workflow* to be reviewed sequentially by each reviewer/content specialist. When you finish reviewing a topic in the workflow, it is automatically sent to the next person in the workflow.

eCalendar workflow procedures:

1. The eCalendar team will arrange a kick-off meeting to discuss the coming review cycle.
2. Following this meeting, a spreadsheet will be sent to all faculties/schools involved (via eCalendar *faculty coordinators*) containing a list of all eCalendar sections (a.k.a. *topics*), and reviewers for each section. Coordinators will be asked to confirm that all reviewers for each section have not changed, and confirm which *topics* should be sent out for review in the workflow.
3. The Managing Editor will initiate the workflow by sending out an email in Outlook to start the review process. The general workflow passes through these roles:

   Each topic has been assigned reviewers based on subject expertise at the unit and faculty level: an *editor*, *approver*, *coordinator*, and *coordinator 2*. A notification is sent to each person in the workflow, both in Outlook and Webtop (https://cms.mcgill.ca/webtop), to notify them when it is time to take action on a given topic. The task can be accessed through their Webtop inbox. Each task contains a topic that needs to be reviewed or edited. *Topics* are pieces of eCalendar content in XML format.

4. **Editor**: after clicking on the link from the email, an Editor logs into Webtop, views their Inbox, selects a topic to review, verifies the topic's content and modifies as needed, saves the changes, and forwards the topic on to the Approver by clicking "Finish".
5. **Approver**: will review the topic content and changes made by the Editor and further modify content if needed, before forwarding it on to the Coordinator by clicking "Forward". The Approver can also add comments to the topic and reject it back to the editor for further changes. The editor will make the changes and send the topic back to the Approver for another review.
6. **Coordinators:** will verify that all changes made are accurate and appropriate before signing off on the topic. He/she can also choose to contact the Editor or Approver directly for further clarifications, and make further changes to the content if needed. The Coordinators can leave comments and reject the topic back to the Approver or Editor if necessary; the Coordinator will then see the document again for another review and sign-off before sending it on to the Copy Editor in Enrolment Services.
7. **Copy Editor:** will verify that all content is free of typos, grammatically correct, and contains consistent styling. If there are major inconsistencies or the information is unclear, inconsistent, or inappropriate, the Copy Editor will contact the appropriate performer directly to discuss the change or reject the topic back to them.
8. **Technical Verification:** will verify all information for consistency and ensure the technical requirements for publication are met.
9. **Translator (*optional*):** will insert translated text into French topics.

Roles are described further under: Getting Started for Individual Roles.

Webtop – Content Management System

What is Webtop?

Webtop is the web-based interface you will use to access content stored in the Documentum content management system.

The Webtop interface is a powerful tool which allows you to:

- Create files and folders
- View the contents of files and folders
- Edit files
- View and change the properties of files
- Review files in workflows with up to 6 reviewers
- …and much more

However, for the eCalendar, you will only be using the features that have been defined based on your role (Editor, Approver, or Coordinator).

Browser Requirements

Webtop requires Internet Explorer versions 7–11 for full functionality. Limited functionality is available using Mozilla Firefox 2.0.

Log into Webtop

To access contents of the CMS, you need to log into **Webtop**. Enter the URL for the system in your browser address bar: https://cms.mcgill.ca/webtop and go to the site.

1. Enter your **McGill Username.**
2. Enter your **McGill Password**.
3. The **Repository** should be set to "CMS_ADMIN".
4. For security reasons, **do NOT** check the **Remember my credentials** checkbox.
5. Click **Login** to proceed.

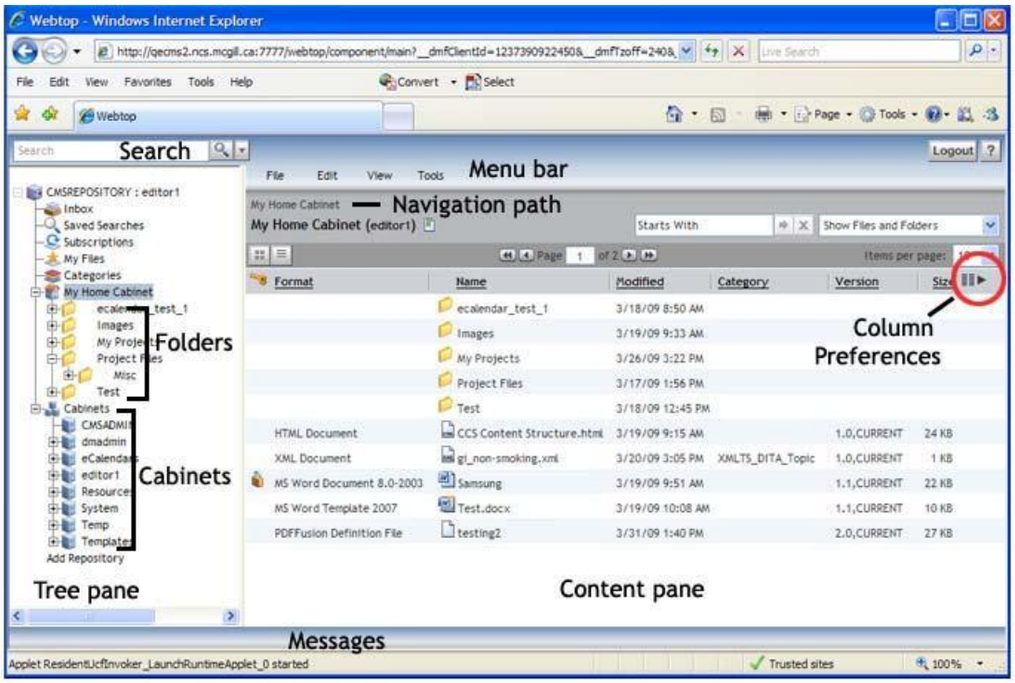
To access Webtop quickly in the future:

Save the Webtop URL as a Favorite in your browser. Click **Favorites > Add to Favorites** in the Internet Explorer toolbar. Or, create a shortcut to that URL on your desktop:

1. Right-click on your Windows desktop and select ***New* > Shortcut**.
2. Paste in the URL: https://cms.mcgill.ca/webtop and click **Next**.
3. Type in "McGill Webtop" in the *Name* field and click **Finish.**

Exploring Webtop Interface

The Webtop interface looks very similar to Windows Explorer:

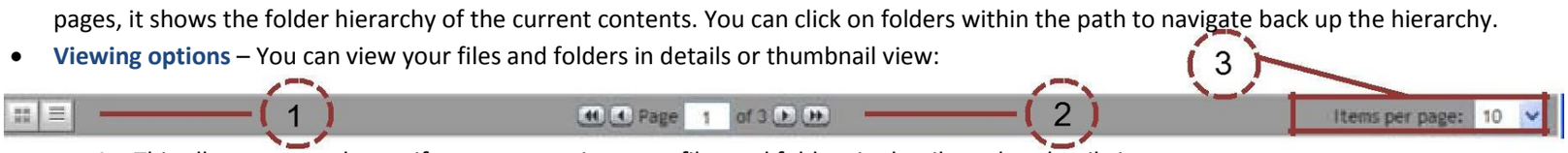


Webtop interface: Navigation tree in left-hand pane, Contents on the right.

Tree pane

In the left-hand pane you see a tree-view structure of files. There are different types of functions:

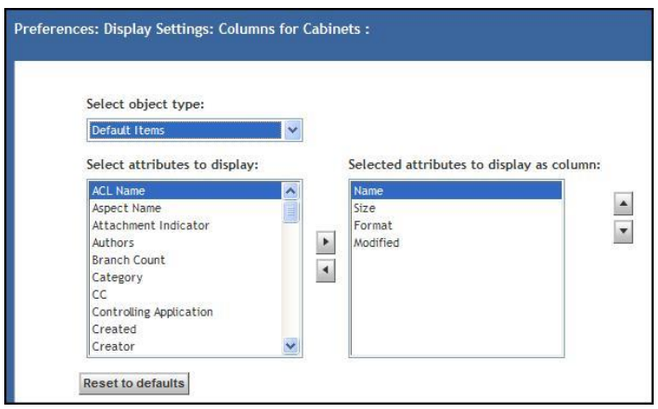
- **Inbox** – This contains tasks and notifications. Files that are sent to you for reviewing during eCalendar review periods.
- **Saved Searches** – This contains pre-defined searches that you have saved
- **Subscriptions** – You can subscribe a file to someone or yourself for easier access to the file. This file will appear in the Subscriptions function. When you access this file from the Subscriptions function, the file is retrieved from its original repository location.
- **My Files** – This is a list of your recent files. Note that this will not be used for the eCalendar.
- **Categories** – Categories are not being used at McGill.
- **My Home Cabinet** – This is similar to My Documents in Windows. It allows you to store links (shortcuts) to the files and folders from other cabinets for easy access.
- **Cabinets** – These are all the cabinets in the current repository that you have permission to view. Note that you may not have permission to edit all of the files within these cabinets. Click the plus sign next to a folder to expand the view, or the minus sign to collapse the view. All eCalendar content is stored in the "eCalendars" Cabinet.
- **Content Pane** – Depending on what you choose from the Tree pane, you will see its folder and/or files in the content pane.
- **Menu bar** – The menu bar above the content pane contains context-sensitive actions that you can perform depending on what is selected.
- **Navigation path** – The Navigation path is located just below the menu bar. It is similar to "breadcrumbs" that you may see on web pages, it shows the folder hierarchy of the current contents. You can click on folders within the path to navigate back up the hierarchy.
- **Viewing options** – You can view your files and folders in details or thumbnail view:



1. This allows you to choose if you want to view your files and folders in details or thumbnail view.
2. This only appears if there is a large number of items for viewing.
3. This allows you to choose the number of items to display on a page.

- **Files/folders listing** – When you select a folder from the Tree pane, the list of files within that folder appears on the content pane. Here you can view the default setting details of each file, such as:
    - **Format** – type or application associated with the file (XML, DITA map, Word, HTML, JPEG, etc.)
    - **Name** – of the file or folder
    - **Modified** – date the file or folder was last updated
    - **Category** – special project-specific designation for certain files
    - **Version** – the current version number for the file

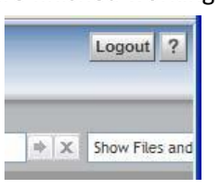
  You can customize the default attributes that appear in this view by clicking the icon that looks like this: 
  In the *Preferences: Display Settings: Columns for Cabinets* window, use the left and right arrow buttons to add or remove attributes; use the up and down arrow buttons to choose the order attributes appear within the content pane.



Changes made using this button only affect the folder you are currently viewing. To change the default column settings for all cabinets, click **Tools** > **Preferences** from the Menu bar, click the **Columns** tab, and follow the same procedure.

Logging Out

When you are finished working in the CMS or leaving your workstation unattended, click the **Logout** button in the upper right corner of the screen.



This ensures that your session is closed properly and your files and folders remain secure. The CMS keeps track of all file modifications, and you are responsible for any changes made to files in your name.

Managing Files

Documentum, like other content management systems, uses a system of locking files while being edited, so only one user at a time can edit a file. This is also referred to as **Checking Out** the file. When you have finished making changes to the file, be sure to **Check In** the file so that others can access it.

In the content pane, files that are checked out by you have a *key icon* next to them, and files checked out by others have a *lock icon* .

Note: When you *check out* a file, the system automatically creates a temporary copy of the file in your local computer. Simply clicking **Save** only updates this temporary copy; to properly save changes to the file in the CMS, you need to both **Save** and **Check In** the file.

If you need to access the temporary copy for whatever reasons, it is usually stored in the following path:
`C:\\Documents and Settings\`*`your _username`*`\Documentum\Checkout` **OR**
`C:\\Users\`*`your_username`*`\Documentum\Checkout`

Procedure to manage your files

To access and update your files:

1. *Right-click* > **Edit** your file to modify it
2. *File* > **Save** and *File* > **Check in** your file when you are finished editing to save changes

Other ways to manage files:

- **Cancel check out**: cancels the lock on the selected file (Note: you will lose any changes to the file.)

Editing a file

From the content pane, right-click on the filename and select **Edit**. The file will be automatically checked out by you (locked for others) and it will open for editing in same window.

After you click on **Edit**, you will see a key icon and other users will see a lock icon next to the file.
This means:

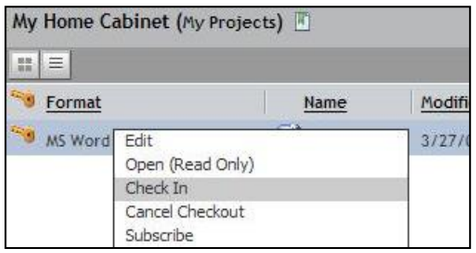
- Others cannot make changes to it
- Others can only view the last version(s)
- The Edit function is disabled for other users
- Others cannot see new changes being made

Note: If you work with Webtop from multiple computers, be sure to **Check In** any files before moving to the other computer; otherwise, they will be locked and inaccessible from any computer besides the one from which they were originally checked out.

Checking In a file

When you are finished editing a file, you need to **Check In** the file to save it in Webtop and others can access it. The procedure of checking in the file also saves it with a new version number, so that there is a record of the changes made since the last time it was edited. You can tell if your file is still checked out by looking for the key icon beside the file name:

1. From the content pane, right-click on the file and select **Check In** from the pop-up menu.

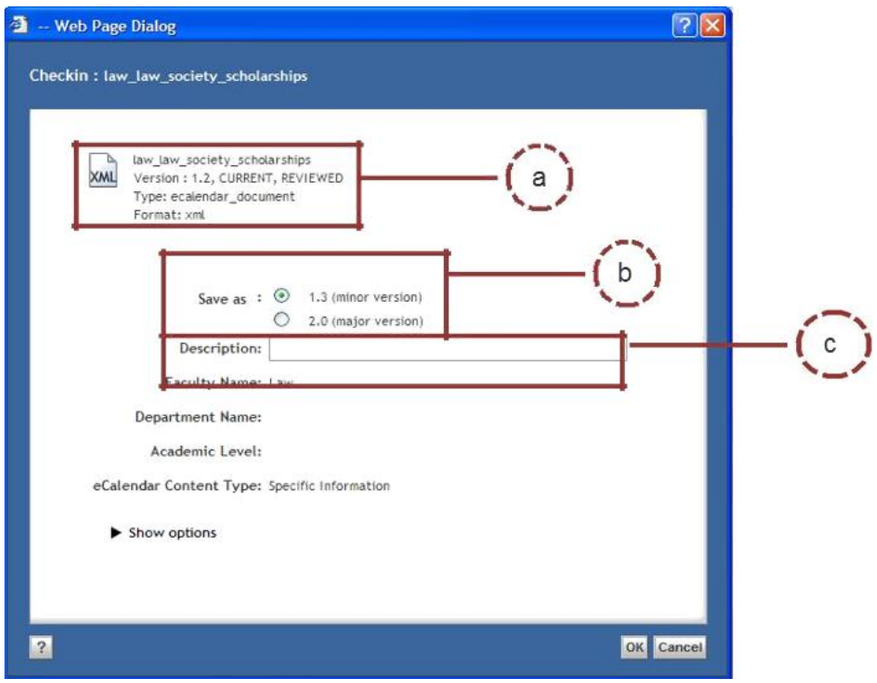


2. The **Check In** window allows you to add details about the current version of the file that you are checking in:

   a. Displays document name and info.
   b. Displays the document's version number.
   c. Provide a **Description** of your changes.

3. The following additional option is available when you click **Show options** in the Check In window:
   a. **Subscribe to this file:** This allows you to have a quicker access to the file. The file is linked to your Subscriptions which is located on the Tree pane.

4. Click **OK** to continue. The message area will display a confirmation: **Checkin successful**. In the content pane, you will notice that the key icon has disappeared and the Version number of the file has changed.



Checking Out a file

When you check out a file, it will automatically check out the selected file and lock it so other users cannot modify it. It is **not** recommended to use the Check Out unless informing the eCalendar team beforehand.

To Check Out a file: From the content pane, right-click the file and select **Check Out** from the pop-up menu. If you use the Check Out procedure and you want to now edit the file, you can do so by selecting ***File* > Edit.**

Cancel Checkout

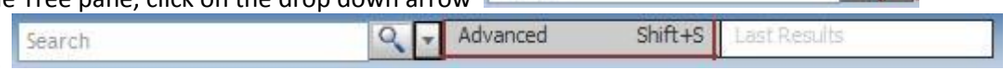
If you checked out a file, but did not make any changes to that file, you can choose **Cancel Checkout** to effectively **undo** the checkout. If you did may changes to the file, these changes will be lost.

Searches

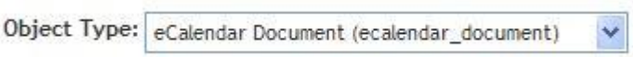
Advanced search

After you log into Webtop,

1. On the top of the Tree pane, click on the drop down arrow 

2. Click **Advanced**. 

3. An **Advanced Search: General** window appears and you may change the following fields:
   a. In the **Object Type** field, click on the drop-down list and select **eCalendar Document (eCalendar _document)**.

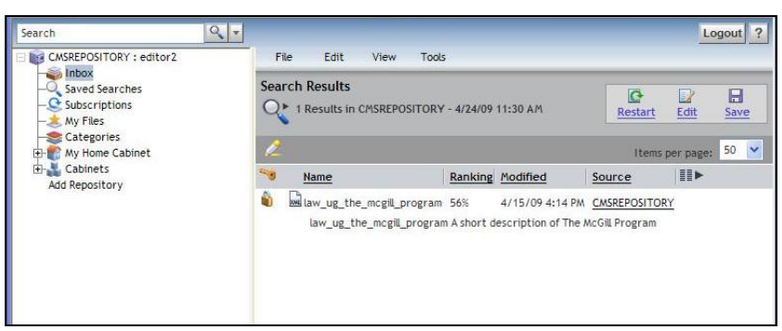
   b. In the **Properties** field, there are three drop down lists. Follow these steps to filter by a reviewer's role:
      i. Select *Editor*; =; and the *Editor's name* in the drop down lists to search for files with a specific Editor:

      ii. To add another role, click on *Add another property* link. Another set of criteria will appear; select *or***.**
      iii. Select *Approver*, *=* , and the *Approver's name*) in drop down lists to search by Approver:

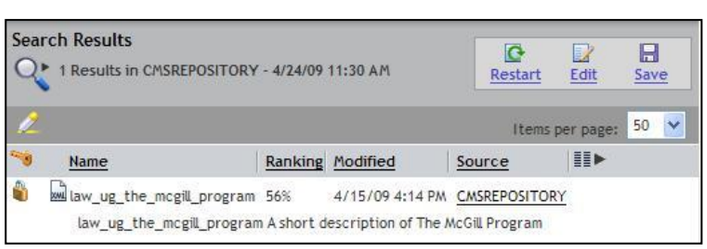
   c. Click on **Search** button to begin your search.
4. The **Search Results** will appear in the Content pane.



Saved searches

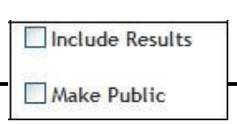
You can save your search results to put it in the Saved Searches from the Tree pane.

How to save your search results



1. After completing a search, you will be in a **Search Results** view in the Content pane:
2. Click **Save.** 

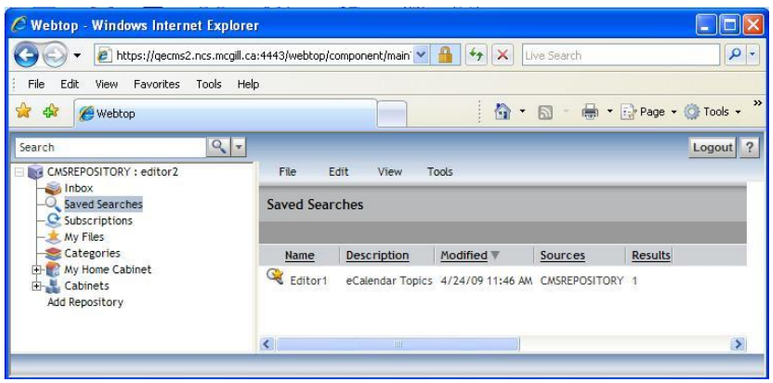
3. A **Save Your Search** window appears and change the following fields:
   a. Beside **Name** field, enter a name for your save results
   b. Beside **Description** field, enter a description to describe your saved search results (optional).



c. Make sure you uncheck **Include Results** and **Make Public**
d. Click **OK**.

How to view your saved search results and begin editing the XML document

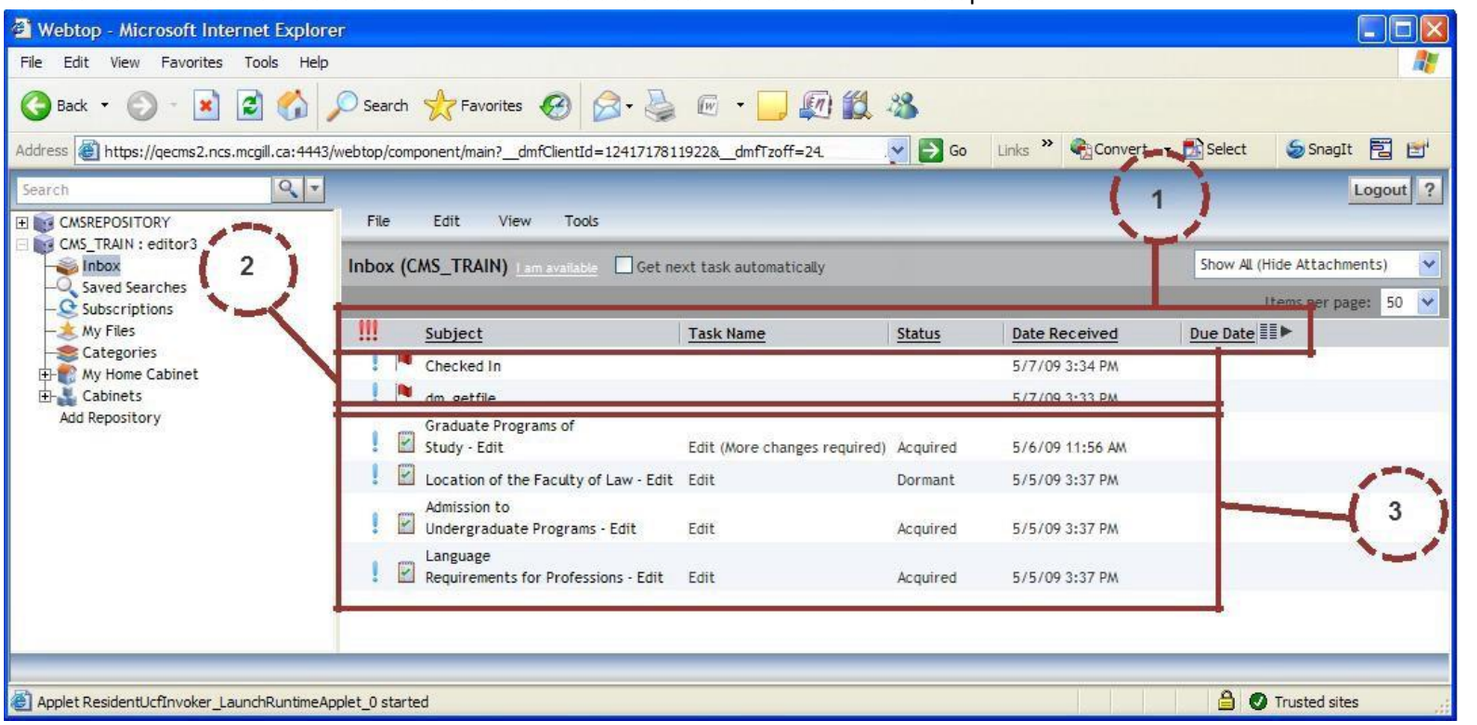
1. From the Tree pane, click **Saved Searches**.
2. You will see the name of your saved search results in the Content pane. Double-click on it.
3. You will see all documents that are assigned to your saved search. If you are a reviewer for a document, *right-click* on it and select **Edit** from the pop-up menu.
4. Follow instructions on how to insert elements in XMAX.



Webtop Inbox

Your Inbox contains tasks and notifications. Tasks are workflow items that have been assigned to you for review by the Managing Editor.

Notifications are messages that an event has occurred. For example, if you are working on some documents jointly with co-workers and you want to be notified whenever one of those documents is edited and checked in. Webtop Inbox:



1. Inbox item properties **2. Notifications** **3. Tasks**

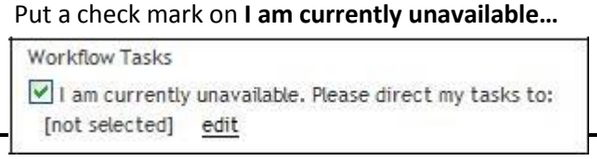
Inbox options

Availability status

This is used to inform others of your availability. ***Note: this feature is not used for eCalendar work***.

The default status is "available". If you are not available, for example, going on vacation, do the following:

1. Click on **I am available** link.
2. Put a check mark on **I am currently unavailable…**



3. Click **Edit** to assign it to someone else.
4. Find the person you want to reassign the task to and click **OK.**

Get next task automatically

Leave this box unchecked at all times: 

Note: this feature is not used for eCalendar work.

Inbox items

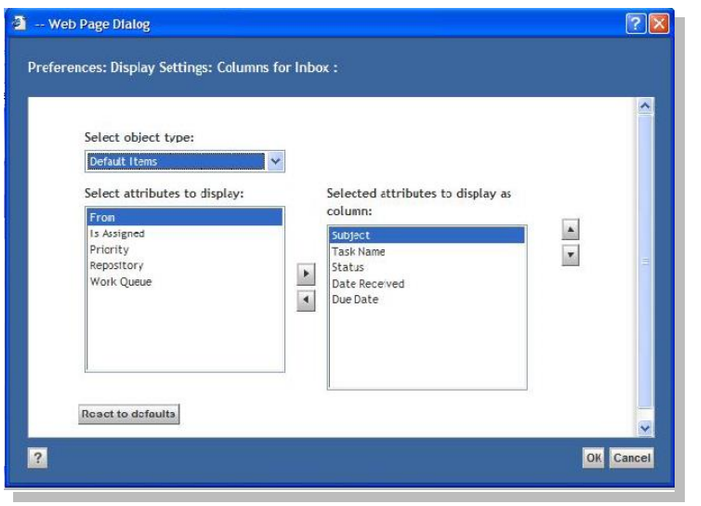
In the Inbox, different types of items are identified by their icon, *ex.*: ,

Default Columns

- **Subject:** This contains the document filename and type of task (icon).
- **From**: Identifies who created the file by their username.
- **Date Received**: The date and time the task was assigned.
- **Due Date**: The date and time the task needs to be completed. This feature is not currently being used in the eCalendar.
- **Status**: The status will change based on your interaction with the task. When you receive the task, the status is Dormant. The status changes to Acquired once you open the task (whether or not you open the actual document).
- **Repository**: Indicates the location of the file.
- **Priority**: Not currently being used at McGill.

Note: If you want to change the default columns:

1. Click **Tools > Preferences**.
2. Click **Columns** tab.
3. Scroll down to **Inbox** and click **Edit**.
4. Choose which attributes you want to display on the inbox content pane.



Notifications

There are three different notification types:

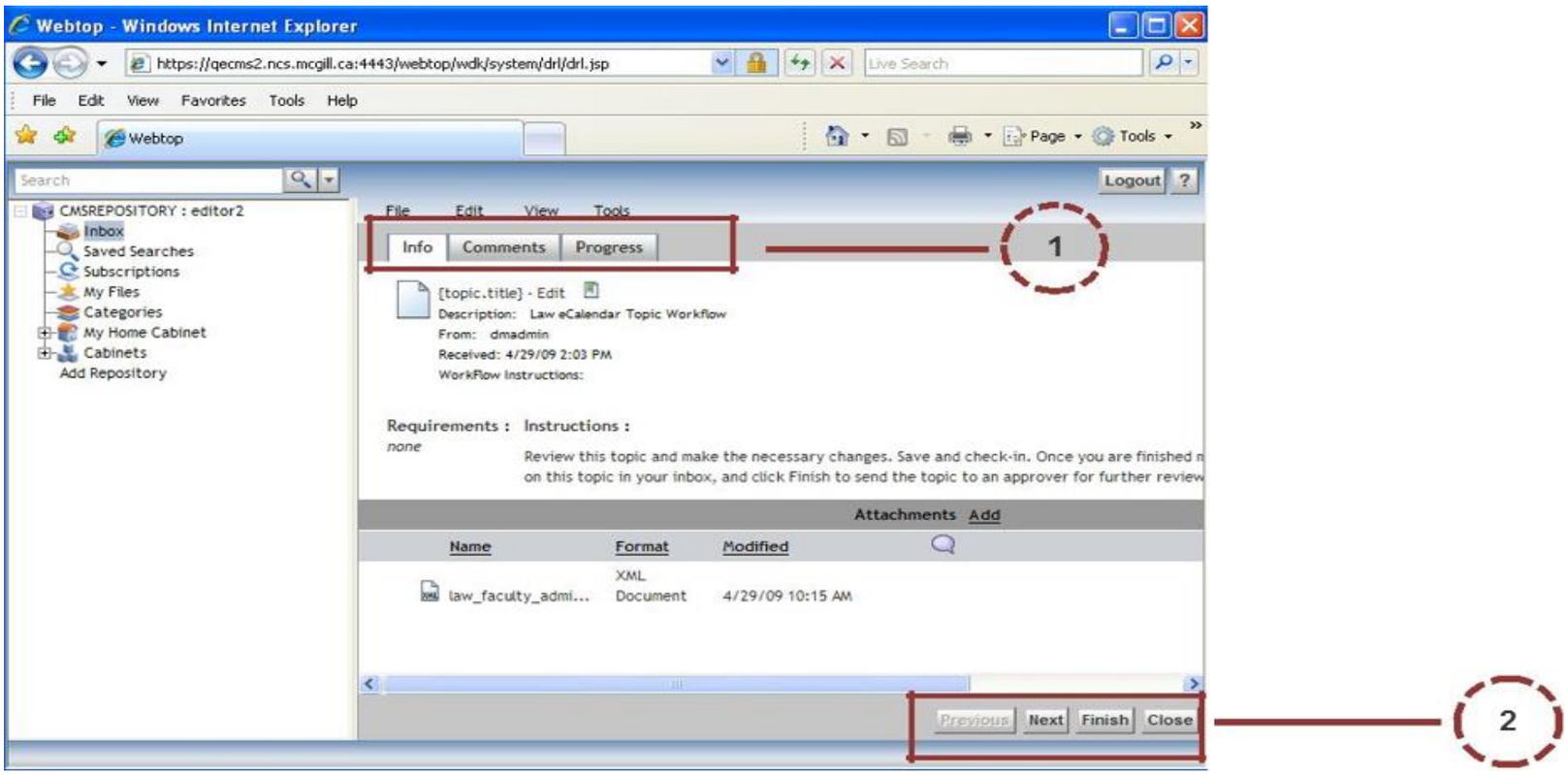
- **Change notification:** Notifies you when file(s) have been checked in:
  

  To turn on change notification: from the task view, *right-click* the file and select **Turn on Change Notification** from the pop-up menu.
- **Read notification**: Notifies you when someone has read a file(s):
  

  To turn on read notification: from the task view, *right-click* the file and select **Turn on Read Notification** from the pop-up menu.
- **Error notification**: Notifies you of an error that has occurred.

Task view

From the Inbox listing, click on the task to see this view:



Task view: **1. Tabs (only the "Info" tab is used for the eCalendar)** **2. Action buttons**

Tabs

The tabs are **Info**, **Comments**, and **Progress**. **Note**: only the *Info* tab is used for eCalendar work

- **Info tab** – This tab contains instructions, the document filename, the document sender, and document properties. The bottom half of this tab contains the attached document, where you can take action such as view, edit, turn on notifications, and more.
- **Comments tab** – This tab allows you to enter any comments about the XML document.

  To add a comment:
  1. Click **Add**
  2. In the **Comment** field, type your comment.
  3. Select one of the following radio buttons:
     a. **For subsequent recipients** – Sends the comment to all users performing all future tasks in the workflow.
     b. **For next recipients only** – Sends the comment only to the users performing the next task in the workflow.
  4. Click **OK**.

  Note: Enter any comments about the document **before** you click on any of the action buttons (Forward, Finish, Reject). You will not be able to add comments once the document is submitted to another user of the workflow.
- **Progress tab** – This tab allows you to see the upcoming as well as past events of the workflow.

Action buttons

There are minor differences between action buttons for *Editors*, *Approvers*, and *Coordinators*.

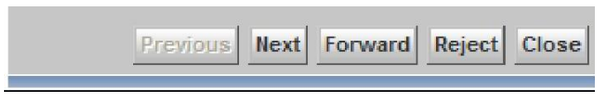
- **Editor** – You will see all of these buttons in each of the tabs:

  - Previous/Next: navigates between tabs (not used for the eCalendar)
  - Finish: forwards the topic to the *Approver*
  - Close: takes you back to your Inbox

- **Approver** – You will see all of these buttons in each of the tabs:

  - Previous/Next: navigates between tabs (not used for the eCalendar)
  - Forward: forwards the topic to the *Coordinator*
  - Reject: sends topic back to the *Editor* for further revisions
  - Close: takes you back to your Inbox

- **Coordinator** – You will see all of these buttons in each of the tabs:



  - Previous/Next: navigates between tabs (not used for the eCalendar)
  - Forward: forwards the topic to the *Copy Editor*
  - Reject: sends topic back to *Editor* or *Approver* for further revisions
  - Close: brings it back to the main Inbox which is your list of tasks

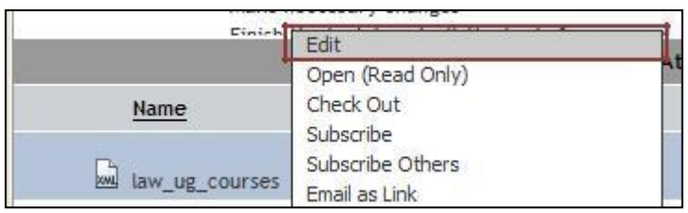
Getting Started for Individual Roles

The following is step by step instructions for *Editors*, *Approvers*, and *Coordinators* in Webtop:

Editor's role

After logging into Webtop:

1. If you clicked on the task link from an email, the task view will open automatically. Otherwise, go to the Inbox from the tree pane and **double-click** on the task.
2. In the **Info** tab, you will see the document filename.
3. **Edit** the document:
   a. From the bottom of the **Info** tab, right-click on the document and click **Edit.**



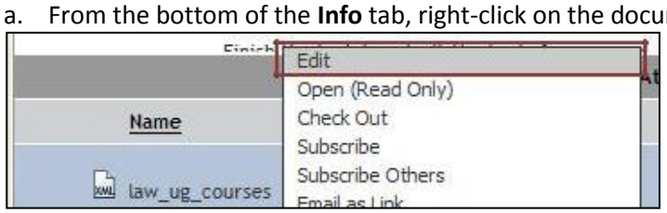
   b. Follow the instruction on how to insert elements in XMAX.
4. **Forward** the task**:**
   a. Once you have made changes to your document and are ready to send it to the Approver, click **Finish**.

   b. Click OK.

Approver's Role

After you have logged into Webtop:

1. If you clicked on the task link from an email, the task view will open automatically. Otherwise, go to the Inbox from the Tree pane and **double-click** on the task.
2. In the **Info** tab, you will see the document filename.
3. **Edit** the XML document:
   a. From the bottom of the **Info** tab, right-click on the document and click **Edit.**



   b. Follow the instruction on how to insert elements in XMAX.
   c. If you feel that you need the Editor to further modify the topic, you can reject the task back to the Editor.
      From the Info tab action buttons; click **Reject**.

      The task will be removed from your Inbox and sends it back to the Editor.

Once the Editor has made the changes to the document, the task will be returned to you.

4. **Forward** the task: Once you have made changes to your document and are ready to send it to the Coordinator, click Forward.

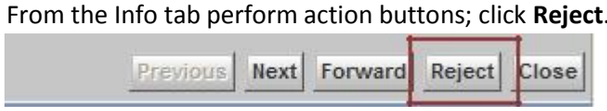
Coordinator's Role

After you have logged into Webtop:

1. If you clicked on the task link from an email, the task view will open automatically. Otherwise, go to the Inbox from the Tree pane and **double-click** on the task.
2. In the **Info** tab, you will see the document filename.
3. **Edit** the XML document:
   a. From the bottom of the **Info** tab, right-click on the document and click **Edit.**

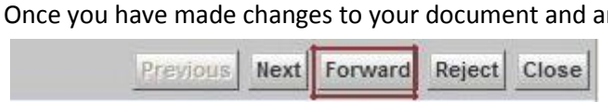
   b. Follow the instruction on how to insert elements in XMAX.
   c. If you feel you need the editor or approver to further modify the topic, you can reject the task back to them.

From the Info tab perform action buttons; click **Reject**.



Choose who you want to reject it back to. The task will be removed from your Inbox and send to the Editor or Approver. The task will be returned to you when the additional changes have been made.

4. **Forward** the task:
   a. Once you have made changes to your document and are ready to send it to the Copy Editor, click **Forward**.



   b. You will be prompted to sign off using your McGill Password (of your McGill Username).
   c. Click **OK**.

XMAX

XMAX is the editing software integrated with Webtop. It is used to create and modify XML (eCalendar) documents. Similar to HTML coding, *elements* are used to identify distinct types of content such a paragraphs, lists, tables, and more. The eCalendar uses a small subset of available elements, described below.

Browser requirement

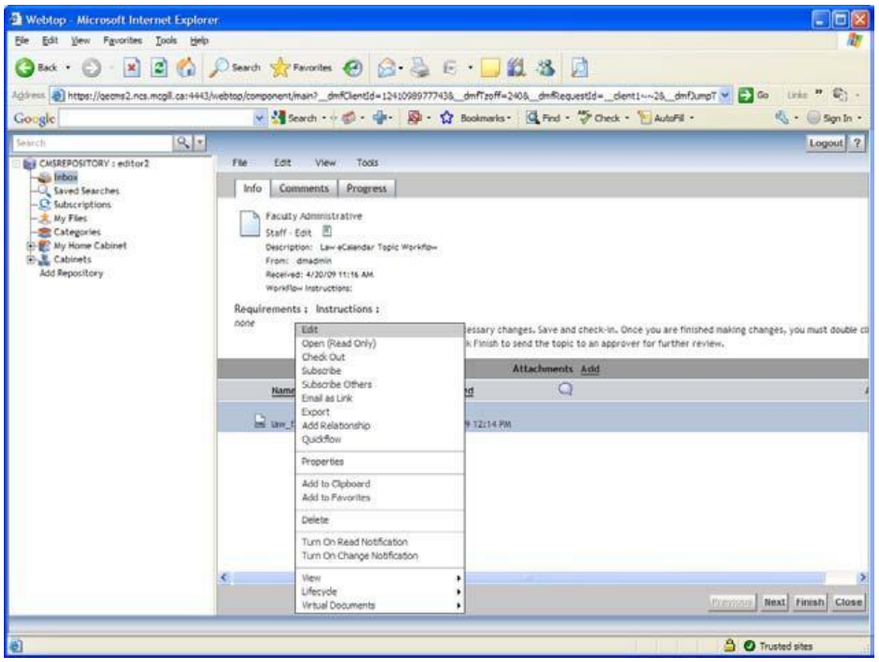
XMAX only works in Internet Explorer 7, 8, 9, 10, or 11.

Getting started: Editors, Approvers, and Coordinators

The following are steps on how to access XMAX and how to edit XML document for the Editor, Approver and Coordinator.

Once you log into Webtop, click on a task from the Inbox Content pane. Then, the Task view will open.

1. **Right-click** on the document filename and click **Edit**.



2. XMAX will open. You will see a pop up window indicating that **Change Tracking is on**. Click **OK**.
3. **Review** the content of the document and make modification as needed (See section on elements)
4. **Save** often (*File* > **Save**)
5. **Check In** when finished working on a document for any extended period (*File* > **Check In**)
6. The Check In window displays. Add a short **Description** of changes made. Click **OK**. XMAX will close and you will return to Webtop Inbox
7. Repeat steps 1-6 as many times as necessary before forwarding a topic.
8. When you are satisfied with a topic, **double-click** on the topic's task in your Webtop inbox; the Task view will open
9. Ensure that there is no *key* or *lock* icon beside the document name from the Info tab.
10. Click the **Finish** or **Forward** button to submit it to the next reviewer.

Note:

- Make sure that you have finished making all your changes to the document. If you've already forwarded the topic, inform us of further changes by phone or email.
- You will have another chance to review all changes when **Draft 2 PDF**s are sent for each reviewed topic
- If you see the key icon beside the document filename in the Task view, you need to check in the document (*right-click* > **Check In**).

XMAX interface

The application interface includes a variety of visual components to identify and manage content.

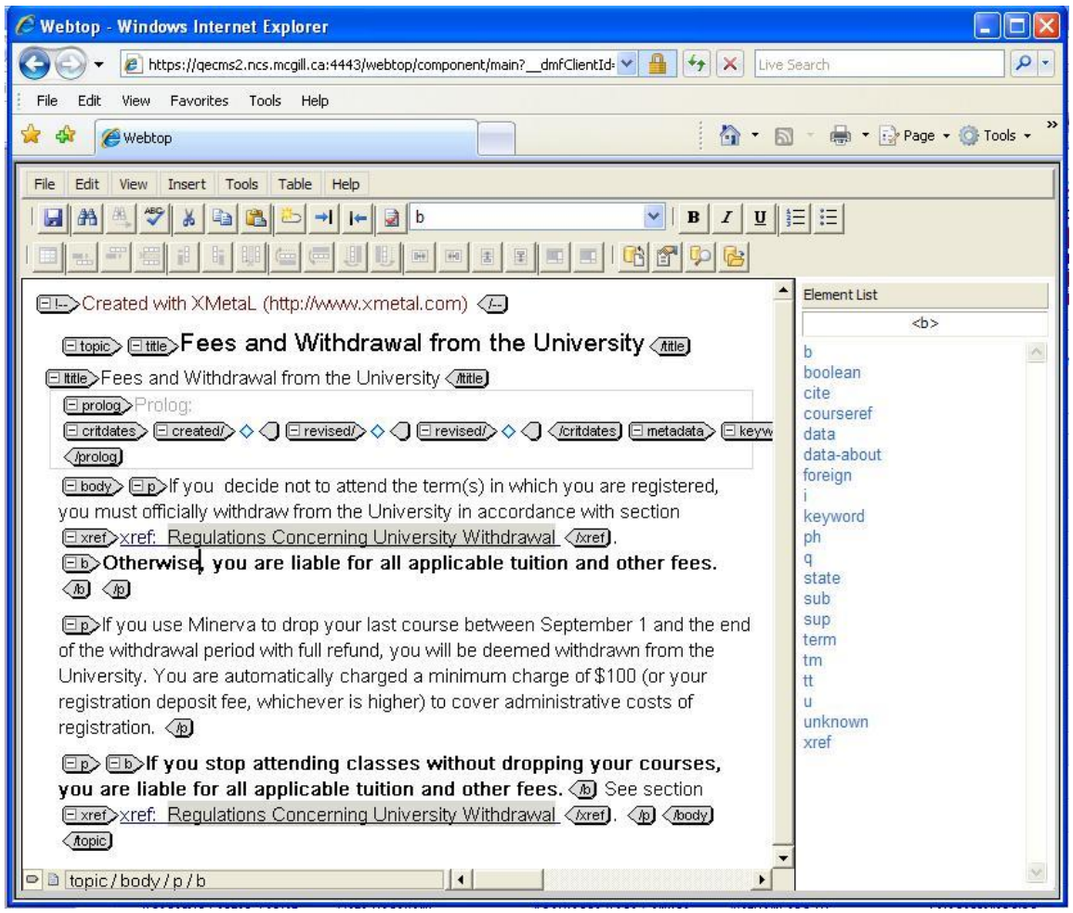
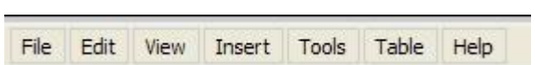


Figure 4: XMAX interface- Menu and toolbars on the top, the content area on the left side, the element list on the right side

Menu and toolbars

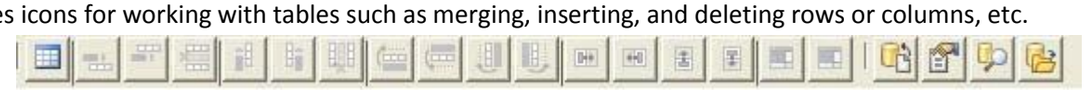
Menu bar – includes File, Edit, View, Insert, Tools, Table, and Help.



Standard toolbar – includes icons for common tasks such as **Save**, **Copy**, **Paste**, etc.

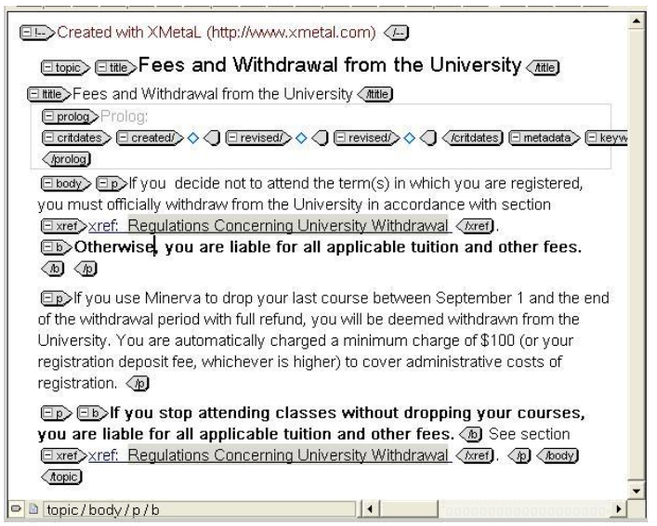
Formatting toolbar – includes icons for applying common formats such as **bold**, *italic*, • lists, etc.

Table toolbar – includes icons for working with tables such as merging, inserting, and deleting rows or columns, etc.



Content area

The content area is where you add or modify content using XML elements.



View – there are two ways to view your document: **Tag view** and **Normal view**. These two views are located on the left-bottom of the interface.

- **Tag view** is the default view. It shows the beginning and the end of each element using icons. We recommend that you use this view to ensure that you don't have any broken elements and to easily see what elements are being used as well as what elements you are inserting.
- **Normal view** is used to see the text without the element tags.

Element list pane

The Element List is where you choose elements to insert into your document and appears on the right-hand side of the XMAX screen. Depending on the location of your cursor within the content area, the system will display the list of elements that can be used.

General Word Processing Functions

XMAX has general word processing functionality, which includes but is not limited to:

Cutting, copying, pasting text

If you decide to cut, copy, and paste text, we recommend that you do these functions in Tag view. If you do it in the Normal view, you may break some elements in the document and may create invalid formatting or errors.

Cut text – remove text and putting it in the clipboard for pasting somewhere else in the document.

1. Select the text.
2. Click *Edit* > **Cut** (Ctrl + x)

Copy text – store existing text/formatting in the clipboard for reproduction somewhere else in the document.

1. Select the text.
2. Click *Edit* > **Copy** (Ctrl + c)

Paste text – insert text that was most recently cut or copied to the clipboard.

1. Insert the cursor in the correct location by clicking where you want the copied text to appear
2. Click *Edit* > **Paste** (Ctrl + v)

Undo text

You can use the **undo** action to backtrack edits until the last save point. To Undo, click *Edit* > **Undo** (or use the keyboard shortcut, **Ctrl + z**)

Save file

You should save your file on a frequent basis, such as when you have made a major change or have finished modifying a small change.

To Save, click *File* > **Save** (or click on the icon  from the toolbar). **Note**: Ctrl + s will **not** save your document.

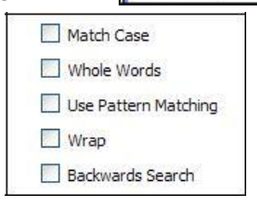
Find or find/replace

Find – quickly search for every occurrence of specific word or phrase in your document.

1. Click *Edit* > **Find and Replace** (or click on the icon  from the toolbar)
2. In the **Find** field, enter the word or phrase that you are looking for
3. Click **Find**.

Find/Replace – automatically replace a word or phrase with a different one. For example, you can replace instances of "Fall 2016" with "Winter 2017". You can select different criteria for your replacement action.

1. Click *Edit* > **Find and Replace** (or click on the icon  from the toolbar)
2. In the **Find** field, enter the word or phrase that you want to replace
3. In the **Replace** field, enter the new word or phrase
4. Click the checkbox(es) to select replacement criteria.

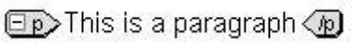


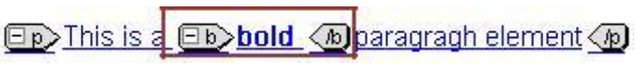
5. Click **Replace**, **Replace, Find** or **Replace All**.

Elements

Elements are similar to HTML tags. Element tags define the type and formatting of content contained within. As in HTML tags, elements have **opening tags** (left-side) and **closing tags** (right side).

The opening tag also allows you to *collapse* or *expand* the element.

- When *collapsed*, tags look like this: 
- When *expanded*, tags looks like this: 

An element can also be *nested* within another element. For example: 

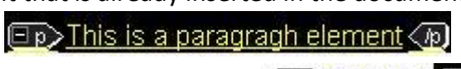
Inserting an element

Depending on where your cursor is in the content area, the **Element List** pane will display the elements that you can use at that point. This feature helps avoid possible errors in your document markup.

1. Position your cursor in the content area
2. Choose an element from the Element list by clicking on it. Some commonly used elements include:
    - *paragraph* **<p>**
    - *unordered list* **<ul>**
    - *ordered list* **<ol>**
    - *list item* **<li>**
    - *cross-reference* **<xref>** (for hyperlinks)
    - *table* **<table>**

Selecting an Element

To select any element that is already inserted in the document, it is best to click on the element's closing tag.

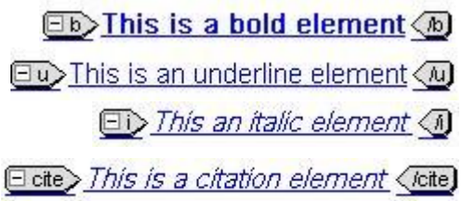
- An element: 

- An element within other elements: 

- A group of nested elements (e.g., in this *paragraph* element, you are also selecting the *bold* and *italic* elements):


Formatting elements

Bold <b>, Underline <u>, Italic <i>, Citation <cite> – To insert a *bold*, *underline*, *italic*, or *citation* element, use either of the two methods below:
Note: use of the *underline* element is **not** recommended, as it confuses between hyperlinks and regular text.



1. Select some text within a *paragraph*, *table*, or *list* element.
    a. Choose desired element from the Element List
    b. The tags will appear around your selected text, which will now appear formatted

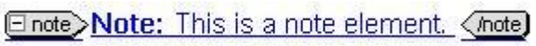
or

2. Place your cursor within a *paragraph*, *table*, or *list* element
    a. Choose desired element from the Element List
    b. The element tags will appear, and you can start typing your text within

Note: The first method will not display as track changes.

Note <note>

This is used for drawing attention to a section. Content within the note element will be formatted differently from the rest of the content in the final eCalendar.



To insert a note element:

1. Position your cursor within the body element but not within an existing *paragraph*, *table*, or *list* element
2. Choose **<note>** from the Element List

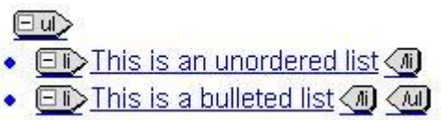
List elements

Simple List – used to properly format addresses and other simple lists.

To insert a simple list element:

1. Position your cursor within the body element but not within an existing *paragraph*, *table*, or *list* element
2. Choose **<sl>** from the Element List
3. Start typing your text (it will automatically create a sub-list)
4. If you want to add more sub-list items for the simple list element, position your cursor before the end of the </sli> tag and press enter on your keyboard. This will automatically create a new sub-list.

**Unordered list ** – the default unordered list is bulleted, though they can also be configured to be dashed.

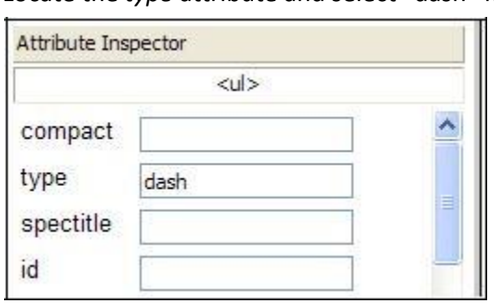


To create a bulleted list (default):

1. Put your cursor at the end of a *paragraph*, *table*, or *list* element.
2. Choose <ul> from the Element List.
3. Start typing and the <li> will be created automatically.
4. If you want to add another <li>, put the cursor before the end of tag and press Enter on the keyboard.

To create a dashed list:

1. Put your cursor at the end of a *paragraph*, *table*, or *list* element.
2. Choose <ul> from the Element List.
3. Start typing and the <li> will be created automatically.
4. If you want to add another <li>, put the cursor before the end of tag and press Enter on the keyboard.
5. Change the type attribute field to dash by:
    a. Place the cursor within one of the list's <li> tags
    b. Click *View* > **Attribute Inspector** in the top menu
    c. Locate the *type* attribute and select "dash" from the drop down list

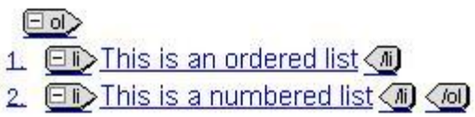


Note: you will only see changes to the style of the list once it is published in the web eCalendar.

**Ordered list ** – the default ordered list is a numbered list, though other types of list are available (see Table 1).

Table 1:

List type	Displays	Attribute Inspector(Type)
Numbered	1. 2. 3.	default
Alphabetic	a. b. c.	alpha
Upper alphabetic	A. B. C.	upperalpha
Roman	i. ii. iii.	roman
Upper roman	I. II. III.	upperroman



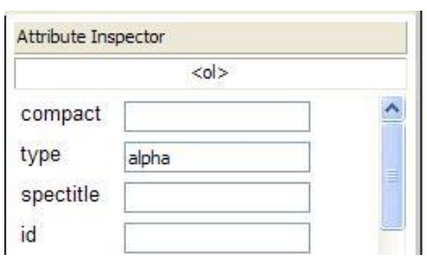
To create a numbered list (default):

1. Put your cursor at the end of a *paragraph*, *table*, or *list* element.
2. Choose <ol> from the Element List.
3. Start typing and the <li> will be created automatically.
4. If you want to add another list item, put the cursor before the end of the element and press **Enter** on the keyboard.

To create other lists:

1. Put your cursor at the end of a *paragraph*, *table*, or *list* element.
2. Choose <ol> from the Element List.
3. Start typing and the <li> will be created automatically.
4. If you want to add another list item, put the cursor before the end of the element and press **Enter** on the keyboard.
5. Once you finished creating your ordered list, you have to change the **type** attribute field.
    a. Place the cursor within one of the list's <li> tags
    b. Click *View* > **Attribute Inspector** from the top menu.
    c. Locate the **type** attribute and enter your desired type based on *Table 1* above. For example, in this screenshot, we entered "alpha" in the **type** field for an alphabetic list.
    d. Turn off the Attribute Inspector by clicking on *View* > **Attribute Inspector**.

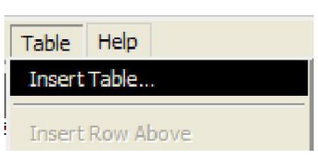
    Note: you will only see changes to the style of the list once it is published.

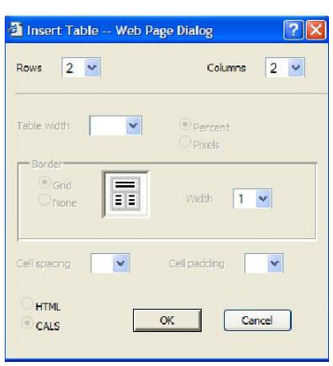


Table

This is used to create a table in your XML document.

To insert a table:



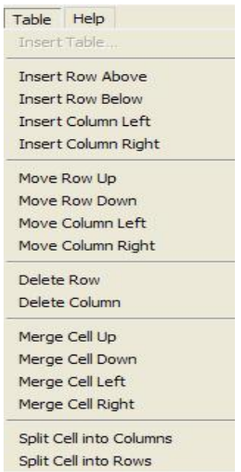


1. Click *Table* > **Insert Table**.
2. Select the number of rows and columns.
3. Click **OK.** You should see the Table inserted in your document.

For other Table features, do the following:

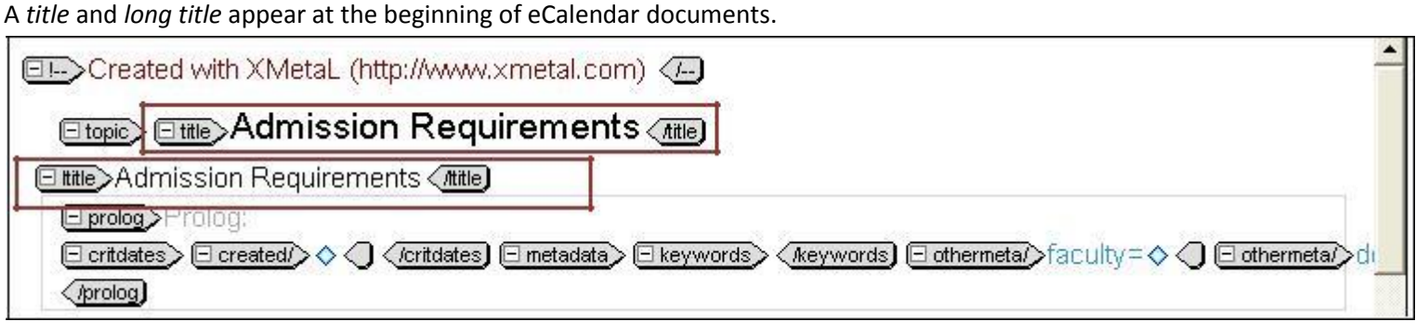
1. Once you insert the table, put your cursor inside a cell.
2. Click *Table* from the top menu and choose any of the features from the list.

Note: Do not insert a Table from the Element List pane; use the Insert menu.



Title <title> vs long title <ltitle>

A *title* and *long title* appear at the beginning of eCalendar documents.



The ***title*** is the title that will appear at the top of the following content in the published eCalendar and PDFs. Users are able to modify the title and should insert a comment (*Insert* > **Comment**) explaining the requested change.

The ***long title*** is an elaboration of the title, and is included for SEO purposes (to make the page easier for web search engines to find). For example, a topic's *title* may be "Course Requirements", while the *long title* may be "Course Requirements for Students in the Faculty of Law".

Comment

Comment elements are for communicating internally and do not appear in the final eCalendar publication. It is used to indicate reasons for a change, to ask questions to others in the workflow, or to request further changes from someone else in the workflow. For example, when you change the title of the document, you would use a comment element to explain the change.

To insert a comment element:

1. Position your cursor within the document body
2. Click on *Insert* > **Comment**

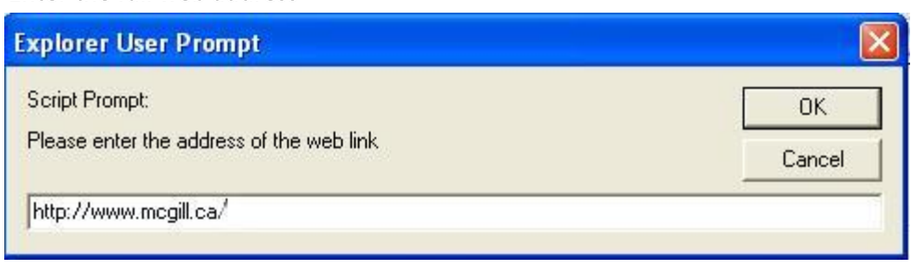
Linking and cross-references

The *cross-reference* <xref> element is used within *paragraph*, *table*, or *list* elements. This element is also used to activate an email address and link it to your email client; see the email (mailto) links section for information on how to activate email addresses.
There are two different ways to link:

A. **Link to an eCalendar page:** This allows you to create a link to another eCalendar document.
   1. Place your cursor where you want to insert the link
   2. Click *Insert* > **Cross Reference**
   3. Browse to the file in the Webtop CMS
   4. Click the desired file and click **OK**
   5. Click **Yes** in the pop-up window. The link will be added to the document's content.

Note: The text that appears in the <xref> tags represents the topic's *title* and cannot be changed.

B. **Link to a website:** This allows you to create a link to a website.
   1. Place your cursor where you want to insert the link
   2. Click *Insert* > **Web Link** from the top menu
   3. Enter the full web address



   4. Click **OK**. The link will be added to the document's content.

   5. Open the **Attribute Inspector** to make sure the **format** is set to "html" and the **scope** is set to "external":
      a. Click text inside the <xref> tag.
      b. Click *View* > **Attribute Inspector**
      c. Scroll down to locate **format** and **scope** attributes
      d. The **format** attribute field should show "html", and the **scope** attribute field should show **external**

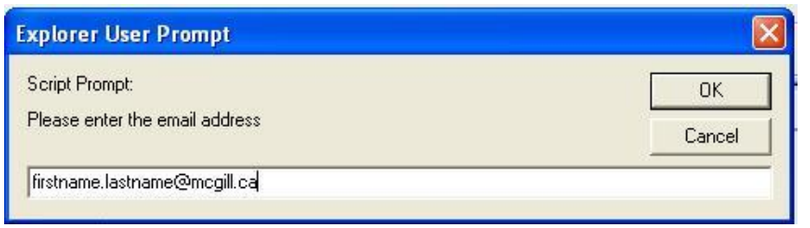
If you want to replace the web address with a text:
   1. Click and drag with your mouse to highlight the web address (make sure you don't delete the "xref:")
   2. Type the desired text

Note: After you have changed the display text, you can verify the web address by hovering over the xref tags with your mouse pointer.

Email (mailto) links

This allows you to activate (link) an email address in your document.

1. Place your cursor where you want to insert the email address
2. Click *Insert* > **Email**
3. Enter the full email address

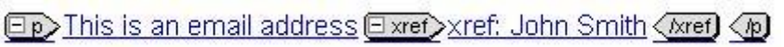


4. Click OK. The linked email address will be added to the document's content.

5. Open the Attribute Inspector to make sure the **format** is set to "html" and the **scope** is set to "external":
   a. Click text inside the <xref> tag.
   b. Click *View* > **Attribute Inspector**
   c. Scroll down to locate **format** and **scope** attributes
   d. The **format** attribute field should show "html", and the **scope** attribute field should show **external**

If you want to replace the email address with text:

1. Click and drag with your mouse to highlight the email address (make sure you don't delete the "xref:")
2. Type the desired text



Advanced Elements

Subtopic

A *subtopic* is created using the <topic> element tags and used when content is closely related to, and should be linked to, its parent topic. A subtopic should be created only when its content and flow will be clearest as a subtopic of another standalone topic, as opposed to a subsection of that other topic or as its own standalone topic.

Note: Most users do not have access to create subtopics. Please leave a comment (*Insert* > **Comment**) for Enrolment Services to request a subtopic.

How to create a subtopic:

1. Place your cursor before the closing </topic> at the end of a document's content
2. **Double-click** on *topic* in the element list
3. Place your cursor between the <title> tags and enter your desired subtopic title
4. Place your cursor after the </title> tag and **double-click** on *ltitle* in the element list and enter your desired *long title*
5. Place your cursor between the <body> tags and enter your desired subtopic text

Superscript

The superscript <sup> element is useful when displaying indicators (e.g., numbers, symbols) that appear smaller and above the baseline. For example, $3^{\mathbf{rd}}$ Floor (the "rd" would appear between <sup> tags).

Subscript

The subscript <sub> is useful when displaying indicators (e.g., numbers, symbols) that appear smaller and below the baseline. For example, in water's chemical formula H_2O, the "2" would appear between <sub> tags.

Tips for Inserting Elements

The following are tips to keep in mind when you insert an element:

- Use the elements listed in the inserting an element and advanced elements sections.
- Don't create *table*, *note*, and *list* elements within a *paragraph* element; it is best to create these elements by themselves.
- You can insert accented characters using the keyboard shortcuts (e.g., alt + 130) or using the Character Map (PC only; *Start menu* > *All Programs* > *System Tools* > **Character Map**).
- All special characters work in XMAX; it will transform them in the special encoding code if necessary. N
- Use the "Enter" button carefully; hitting the 'Enter' button sometimes inserts a new element.

Track Changes

Track changes allows you to keep track of any modifications—inserted, deleted, moved, or modified text– when made to content in the document.

When editing a document, track changes is enabled automatically. Click **OK** to start editing.

Note: if a change ever fails to display as a tracked change, please leave a comment in the document (*Insert* > **Comment**) indicating the change.

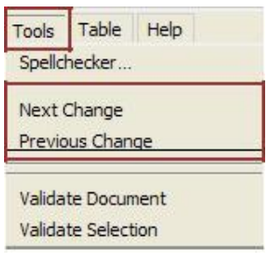
- Added text: Be aware of this policy.
- Deleted text: ~~decide not~~

Viewing track changes

If track changes appear in your document, it means that another user has already modified the document. Hover over the changed text to view the name of the user who made the modification, as well as the date the modification was made, in a popup.

How to use Track Changes

You can jump to tracked changes in a document; in the top menu, click *Tools* > **Next Change** or **Previous Change**:



Next Change – to view the next change, click *Tools* > **Next Change**. This will bring your cursor to the next modified content in the document.

Previous Change – to view the previous change, click *Tools* > **Previous Change**. This will bring your cursor to the previous modified content in the document.

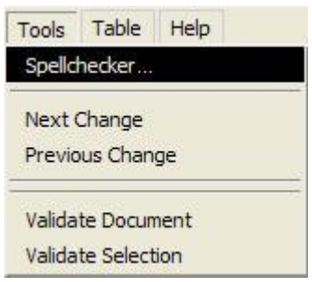
Spell Checker

As with all documents, it is good practice to perform a spell check on it before saving and checking it in.
Note: this functionality is not used for the eCalendar

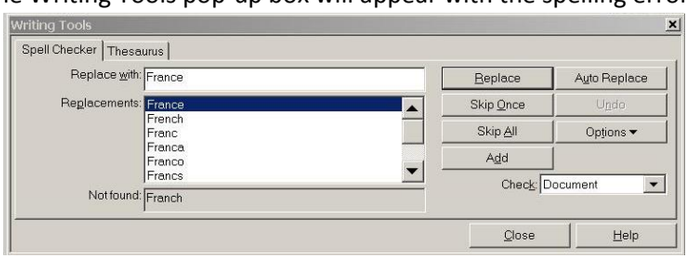
How to use the Spell Checker

To invoke the Spell Checker:

1. Click *Tools* > **Spellchecker**

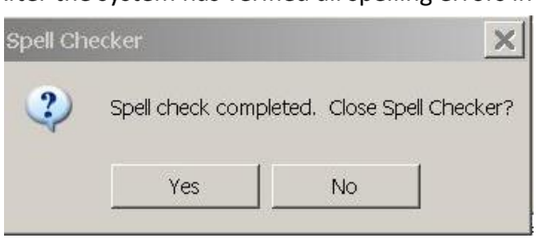


2. The Writing Tools pop-up box will appear with the spelling error.



Note: Use this feature the same as you would use in any other Spell Checker tool such as in Word.

3. After the system has verified all spelling errors in your document, click **Yes** to exit the Spell Checker.

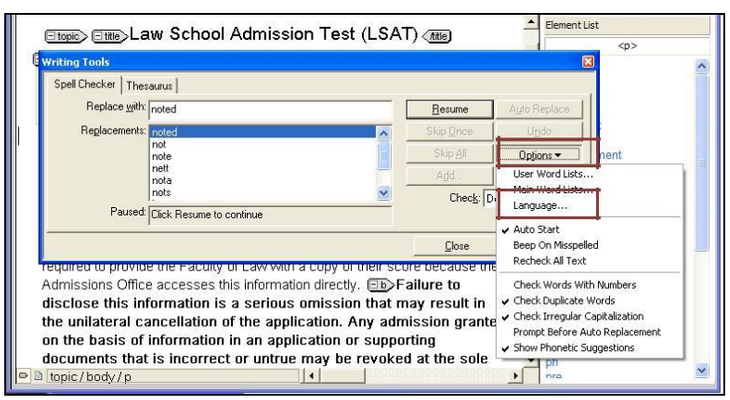


Set the Language

You can set your preferred language for the Spell Checker tool.

To set the language:

1. After opening your document, click *Tools* > **Spellchecker**
2. From the **Writing tools** pop-up, click *Options* > **Language**
3. Select the desired language from the **Select Language** window
4. Click the **Save as default Writing Tools language** in the check box
5. Click **OK.**



Validation

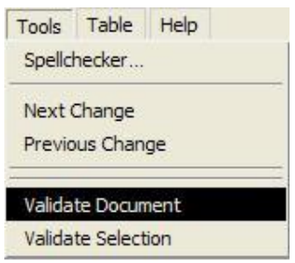
Documents have to adhere to a set of rules which ensure that the document follows a required structure for successful publication. The **Element List** pane is one of the ways the system validates the XML language. Using the Element List pane is preferred since only the elements that can be inserted in the current location are listed. This will prevent errors.

You can also use the **Validation** feature to thoroughly check your document, which will report any errors that are found. Normally, two types of validation errors may occur:

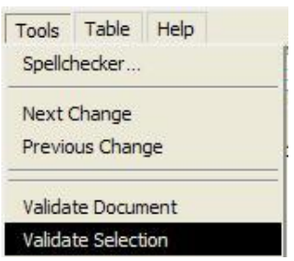
1. Missing content
2. Content that is tagged incorrectly

You can perform a validation check at any time to find errors in either a selection of your document or the entire document.

1. To validate your document:
   a. Click *Tools* > **Validate Document**.



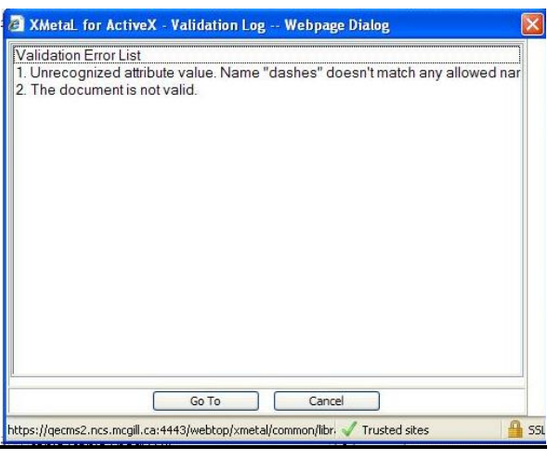
2. To validate a selection of your document:
   a. Select the section that you would like to validate.
   b. Click *Tools* > **Validate Selection**



Understanding the Validation Errors

Errors – if your document has validation errors, a **Validation Log** containing a list of error messages displays. This will give you further information on the errors, allowing you to find and correct them.

Note: you can go to the location of an error by double-clicking the error message.



Best Practices

When working with documents for the eCalendar, we recommend the following best practices:

Do's	**Don'ts**
• Save often and after any major changes • Use *undo* feature when you make a mistake • **Check In** when you are finished working on your topic • Insert comments in the content whenever necessary (*Insert* > **Comment**) • Use only elements mentioned in the inserting an element section	• Don't modify Prolog information • Don't use the Internet Explorer menu • Do not use the Internet Explorer back/forward button

Support

- 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