

SmileMaker Documentation for Schwab Online Standards Team

SmileMaker Overview:

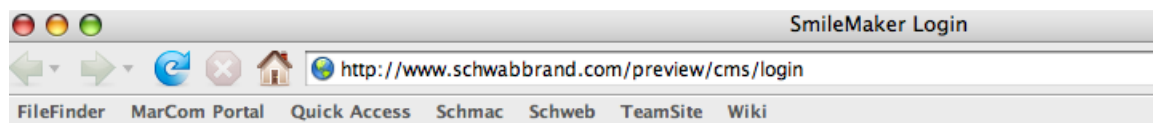
SmileMaker is a Content Management System (CMS) customized for supporting the Schwab Online Standards website. It is designed to make content management and editing easier and more accessible to a larger number of people who may have varying degrees of HTML knowledge and experience. About 70-80% of the site is editable using a visual editor, also known as a WYSIWYG (What You See Is What You Get) editor. This eliminates the need for a person to know HTML in order to make edits to a page. SmileMaker also offers version control so that two people are not editing the same page at the same time, there is a history of all the changes made to any page on the site including the date and time the changes were made and who made them, and the ability to revert back to a previous version. There is also content review and approval controls and user administration within SmileMaker, so that only authorized persons are able to push changes to the live site.

The SmileMaker application moves slowly, so you may need to wait several seconds between clicks for pages/content to load.

Logging in:

1. In Firefox, go to <http://www.schwabbrand.com/preview/cms/login>
2. Login using your Schwab email address (Firstname.Lastname@schwab.com) and your SmileMaker password:

If you do not know or have forgotten your password, contact your Schwab Online Standards Team SmileMaker Administrator.



SmileMaker

User:	<input type="text" value="Firstname.Lastname@schwab.com"/>
Password:	<input type="password" value="*****"/>
<input type="button" value="login"/>	

Editing existing pages:

After logging into SmileMaker, you will see a page that displays a dashboard control panel of all the pages in the site that can be edited.

Locate the **page** section (fourth box from the top).

In the **page** section, find the line that says **cws page** and click [list](#):

The screenshot shows the SmileMaker CMS interface. On the left is a navigation menu with categories: assets, content, email, page, and vanity_url. The 'page' category is expanded, showing a list of page types: - ad, - download, - example, - core guideline, - cws section, - guideline, - link, - section, - showcase item, - basic page, - cws page, - form page, - home page, - listing page, and - vanity URL. The '- cws page' item is highlighted with a yellow background and a red arrow pointing to its 'list | add' link. On the right, a message states: 'The following content and files have been added or edited, but have not yet been approved.' Below this is a table with columns: type, identifier, and modified date. The table contains one row: page.cws, content_development, 01-28-2008 15:37.

type	identifier	modified date
page.cws	content_development	01-28-2008 15:37

Locate the page you want to edit by looking in the **identifier** column. The end of the URL of the page you want to edit should match the text you see in the **identifier** column:

add new cws page search: cws page search

page: 1 2 3 4 5 6 7

name / title		type	identifier	status	modified by	modified date
Buttons	edit preview history	cws page	greenfield_button...	Approved	maryclare.maloney	01-28-2008 14:40
Buttons	edit preview history	cws page	greenfield_button...	Approved	leonard.cross	12-18-2007 15:49
Buttons	edit preview history	cws page	greenfield_button...	Approved	maryclare.maloney	12-14-2007 12:10
Colors	edit preview history	cws page	design_colors_ove...	Approved	maryclare.maloney	12-06-2007 11:59
Colors	edit preview history	cws page	design_global_colors	Approved	maryclare.maloney	12-06-2007 12:00
Colors	edit preview history	cws page	design_primary_co...	Approved	maryclare.maloney	12-06-2007 12:02
Colors	edit preview history	cws page	design_secondary_...	Approved	maryclare.maloney	12-06-2007 12:03
Composition	edit preview history	cws page	content_copy_length	Approved	maryclare.maloney	12-13-2007 09:51
Composition	edit preview history	cws page	content_creating_...	Approved	nathan.rogers	12-06-2007 15:30
Composition	edit preview history	cws page	content_faqs	Approved	maryclare.maloney	12-13-2007 12:21
Composition	edit preview history	cws page	content_forms	Approved	maryclare.maloney	12-13-2007 09:54
Composition	edit preview history	cws page	content_headers_s...	Approved	maryclare.maloney	12-13-2007 12:23
Composition	edit preview history	cws page	content_help_inst...	Approved	maryclare.maloney	12-13-2007 12:24
Composition	edit preview history	cws page	content_hypertext...	Approved	maryclare.maloney	12-06-2007 11:13
Composition	edit preview history	cws page	content_messages	Approved	maryclare.maloney	12-13-2007 12:24
Composition	edit preview history	cws page	content_naming_gu...	Approved	nathan.rogers	12-06-2007 15:34
Composition	edit preview history	cws page	content_notes_dis...	Approved	maryclare.maloney	12-13-2007 12:25
Composition	edit preview history	cws page	content_pagetitles	Approved	leonard.cross	12-06-2007 11:02
Composition	edit preview history	cws page	content_proofing_...	Approved	nathan.rogers	12-06-2007 15:32
Composition	edit preview history	cws page	content_writing_p...	Approved	nathan.rogers	12-06-2007 15:28
Composition	edit preview history	cws page	content_writing_s...	Approved	nathan.rogers	12-06-2007 15:27
Content	edit preview history	cws page	content_development	Pending	justin.kolling	01-28-2008 15:37
Content	edit preview history	cws page	content_editorial...	Approved	nathan.rogers	12-06-2007 16:08
Content	edit preview history	cws page	content_formatting	Approved	maryclare.maloney	12-06-2007 15:24
Content	edit preview history	cws page	content_overview	Approved	nathan.rogers	12-12-2007 10:56
Content	edit preview history	cws page	content_punctuation	Approved	maryclare.maloney	12-06-2007 15:20
Content Development	edit preview history	cws page	content_writing_i...	Approved	nathan.rogers	12-06-2007 15:40
Customer Center	edit preview history	cws page	design_cust_colors	Approved	maryclare.maloney	12-06-2007 14:56
Customer Center	edit preview history	cws page	design_cust_quick...	Approved	leonard.cross	12-14-2007 14:49
Customer Center	edit preview history	cws page	design_cust_selec...	Approved	maryclare.maloney	12-12-2007 15:48

page: 1 2 3 4 5 6 7

Click on [edit](#) link first (clicking preview from this point will not work)

SmileMaker

cws page: content_writing_paragraphs modified: nathan.rogers@schwab.com (12/06/07 15:28) status: Approved version: 0 (history)

label *
Enter the title for the page. Composition

nav label
Enter the label to display in site navigation, if different. Writing Paragraphs

template *
Choose a template to display this page. cws.jsp

body
Enter the content for this page.

Source B I U ?

Writing Paragraphs

A paragraph should contain one topic. When a new topic is introduced, start a new paragraph.

Keep paragraphs short by limiting them to two or three sentences when possible.

Put the most important information at the beginning of the paragraph.

If a paragraph looks too long, it is too long.

rename identifier --open--

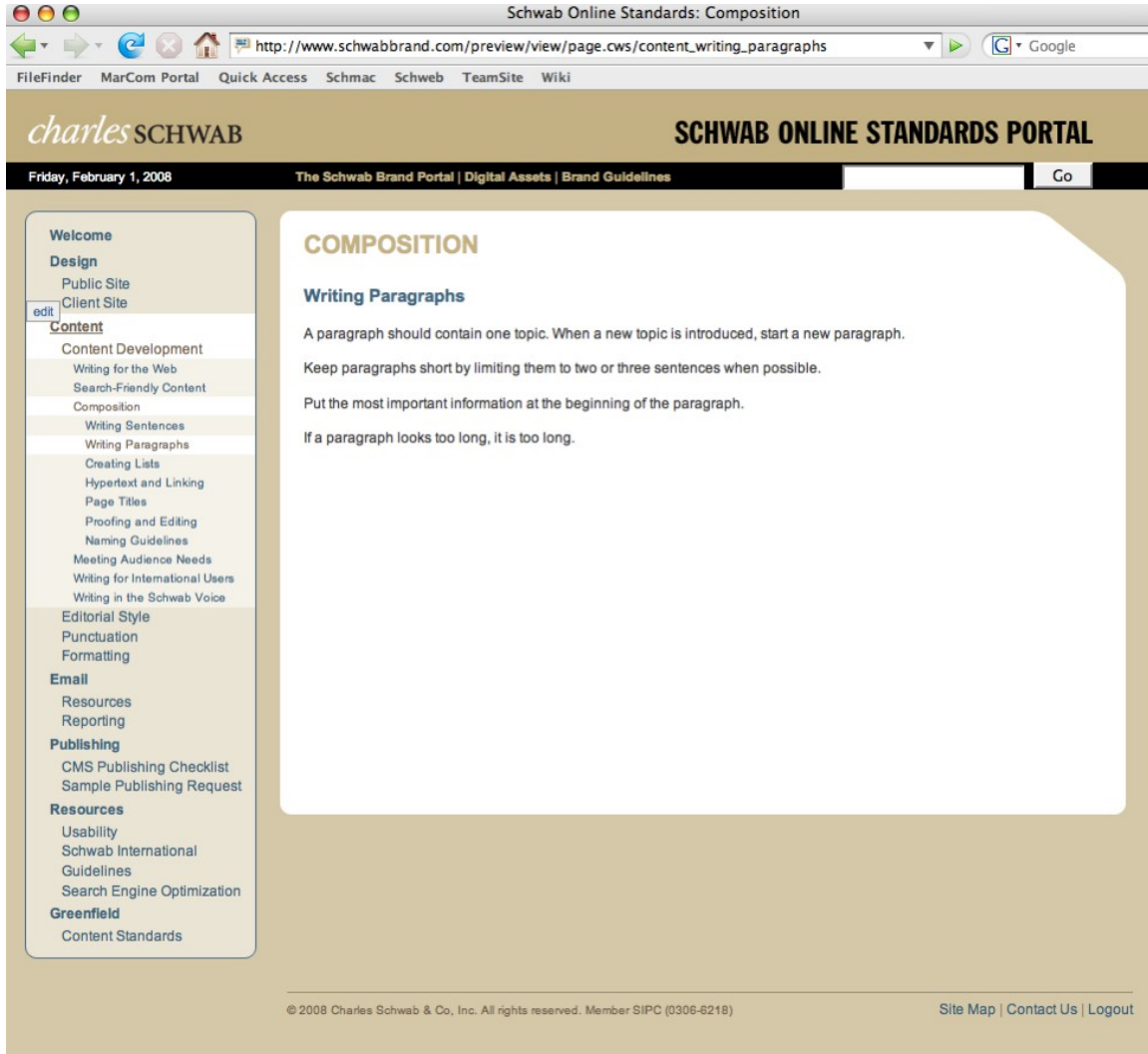
kill --open--

update cws page submit cws page for review

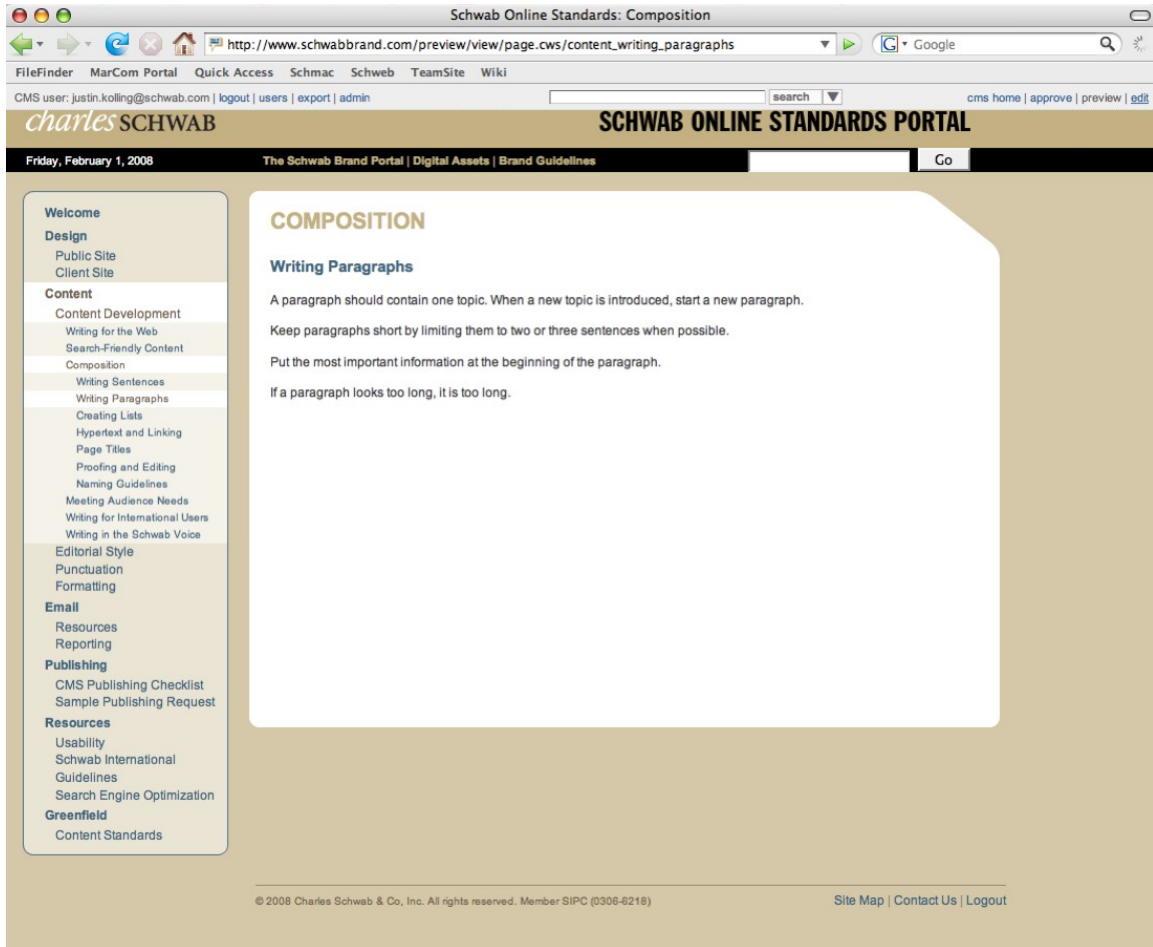
From the [edit](#) page, you may begin editing the text of the page as displayed in the WYSIWYG editor in the center of the screen, you may view and edit the code of the page by clicking the **Source** button, or you may click [preview](#) in the upper right corner of your screen to see what the page looks like on the live site. The WYSIWYG editor only displays the editable text on the page. To see the page with all its graphical and navigational components, click [preview](#).

In [preview](#) mode, use the menu to navigate to the page you want to edit.

If you hold your mouse pointer over the left navigation menu, an option to [edit](#) will appear. Do NOT click [edit](#) here or you will edit the left navigation.



To edit the page you're on, move mouse pointer up towards top of browser window until white SmileMaker menu bar appears across the top then click [edit](#) all the way over to the upper right corner of the page.



If the WYSIWYG editor is available for that page, it will display above the body text field, otherwise you must edit in HTML.

WYSIWYG Editor:

The screenshot shows a web browser window with the URL http://www.schwabbrand.com/preview/cms/edit/page.cws/content_writing_paragraphs. The page title is "SmileMaker" and the page name is "cws page: content_writing_paragraphs". The page is modified by nathan.rogers@schwab.com on 12/06/07 15:28, with a status of "Approved" and version 0. The interface includes a navigation menu with "FileFinder", "MarCom Portal", "Quick Access", "Schmac", "Schweb", "TeamSite", and "Wiki". A search bar is present with the text "CMS user: justin.kolling@schwab.com | logout | users | export | admin". The main content area is divided into several sections: "label *" with the value "Composition", "nav label" with the value "Writing Paragraphs", "template *" with the value "cws.jsp", and "body" which contains a WYSIWYG editor. The WYSIWYG editor shows the text "Writing Paragraphs" followed by three paragraphs of instructional text: "A paragraph should contain one topic. When a new topic is introduced, start a new paragraph.", "Keep paragraphs short by limiting them to two or three sentences when possible.", and "Put the most important information at the beginning of the paragraph. If a paragraph looks too long, it is too long." Below the WYSIWYG editor are two dropdown menus for "rename identifier" and "kill", both set to "--open--". At the bottom right, there are two buttons: "update cws page" and "submit cws page for review".

HTML Editor:

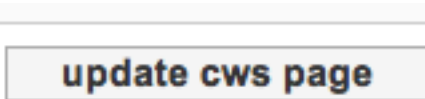
The screenshot shows a web browser window titled "Edit cws page" at the URL http://www.schwabbrand.com/preview/cms/edit/page.cws/content_writing_paragraphs. The page is part of the "SmileMaker" CMS. The main content area is titled "cws page: content_writing_paragraphs" and includes the following fields:

- label ***: Enter the title for the page. Value: Composition
- nav label**: Enter the label to display in site navigation, if different. Value: Writing Paragraphs
- template ***: Choose a template to display this page. Value: cws.jsp
- body**: Enter the content for this page. The content is:

```
<h2>Writing Paragraphs</h2>
<p>A paragraph should contain one topic. When a new topic is introduced, start a new paragraph.</p>
<p>>Keep paragraphs short by limiting them to two or three sentences when possible.</p>
<p>Put the most important information at the beginning of the paragraph.</p>
<p>If a paragraph looks too long, it is too long.</p>
```

At the bottom of the form, there are two buttons: "update cws page" and "submit cws page for review". A note below the buttons reads: "Note: If you submit for review, any appropriate".

Once you are finished editing the page, click the **update cws page** button.



You will be dropped into the preview screen for the page you just edited.

Go up to the top of page and click on [cms home](#) in the upper right corner.

You will see the page(s) you edited in the right column of the screen:

The following content and files have been added or edited, but have not yet been approved.

type	identifier	modified date
page.cws	content_development	01-28-2008 15:37
page.cws	content_writing_paragraphs	02-01-2008 14:20

SmileMaker will send an email notification to your administrator that you have submitted a change for review/approval.

Check with your SmileMaker administrator on the status of your edits. Once you find out they are approved, go back into the site and check the page(s) you edited to test them and ensure they are correct.

Adding a new page:

Return to the dashboard control panel of SmileMaker (either by logging into SmileMaker or moving your mouse to the top of any screen and clicking on [cms home](#).)

Locate the **page** section (fourth box from the top).

In the **page** section, find the line that says **cws page** and click [add](#):

The screenshot shows the SmileMaker dashboard interface. On the left is a navigation menu with categories: assets, content, email, and page. The 'page' category is expanded, listing items like 'basic page', 'cws page', 'form page', 'home page', and 'listing page'. The 'cws page' item is highlighted with a yellow background, and a red arrow points to the 'add' link next to it. On the right side of the dashboard, there is a preview window titled 'The following content and files have been added or edited, but have not yet been approved.' This window contains a table with the following data:

type	identifier	modified date
page.cws	content_development	01-28-2008 15:37

Determine your new page location by reviewing the existing site layout.

The screenshot shows a web page with a header and a main content area. The header includes the Charles Schwab logo and the text 'SCHWAB ONLINE STAI'. Below the header is a navigation bar with the date 'Monday, January 28, 2008' and the text 'The Schwab Brand Portal | Digital Assets | Brand Guidelines'. The main content area is divided into two columns. The left column contains a navigation menu with categories: Welcome, Design (Public Site, Client Site), Content (Content Development, Writing for the Web, The Top Ten Rules, Facts About Online Readers, Goal-Directed Writing, Short, Simple, Direct, Search-Friendly Content, Composition, Meeting Audience Needs, Writing for International Users, Writing in the Schwab Voice), Editorial Style (Punctuation, Formatting), Email (Resources, Reporting), Publishing (CMS Publishing Checklist, Sample Publishing, Request), Resources (Usability, Schwab International Guidelines, Search Engine Optimization), and Greenfield (Content Standards). The right column is titled 'WRITING FOR THE WEB' and contains a sub-section 'The Top Ten Rules' with a bulleted list of ten rules for writing for the web.

charles SCHWAB **SCHWAB ONLINE STAI**

Monday, January 28, 2008 The Schwab Brand Portal | Digital Assets | Brand Guidelines

Welcome

Design
Public Site
Client Site

Content
Content Development
Writing for the Web
The Top Ten Rules
Facts About Online Readers
Goal-Directed Writing
Short, Simple, Direct
Search-Friendly Content
Composition
Meeting Audience Needs
Writing for International Users
Writing in the Schwab Voice

Editorial Style
Punctuation
Formatting

Email
Resources
Reporting

Publishing
CMS Publishing Checklist
Sample Publishing
Request

Resources
Usability
Schwab International
Guidelines
Search Engine
Optimization

Greenfield
Content Standards

WRITING FOR THE WEB

The Top Ten Rules

- Use the active voice.
- Avoid industry jargon.
- Avoid sales speak.
- Sentences should contain one idea.
- Paragraphs should contain one topic.
- Use bulleted or numbered copy when listing.
- Use hyperlinks often and appropriately.
- Apply capitalization and case correctly and consistently.
- Place periods and commas inside quotation marks.
- Use apostrophes to show possession, not to make words plural (IRAs, not IRA's).

The title of the page (**label**) reflects the section that you're in. Check the page location you want to add in relation to the left navigation menu or site map, which displays the hierarchy of the site. One level up from the current level the page exists in the navigation is the main page header (**label**) and the current page level in the navigation is the page sub-title (**nav label**).

The screenshot shows a web browser window titled "Edit cws page" with the URL "http://www.schwabbrand.com/preview/cms/edit/page.cws". The page features a navigation menu with links like "FileFinder", "MarCom Portal", "Quick Access", "Schmac", "Schweb", "TeamSite", and "Wiki". Below the navigation is a search bar and a CMS user information bar. The main content area is titled "SmileMaker" and contains a form for creating a "New cws page". The form has five fields: "identifier *" (text input), "label *" (text input), "nav label" (text input), "template *" (dropdown menu with "cws.jsp" selected), and "body" (a large text editor with a toolbar containing "Source", "B", "I", "U", and "?"). At the bottom of the form are two buttons: "update cws page" and "submit cws page for review".

The page's content (text and possibly images) goes into the **body** field.

The **template** field defaults to cws.jsp—leave that field unchanged.

WYSIWYG editing:

Currently, the WYSIWYG editor allows you to edit the text in the body of any page in the site. If you want to add or edit colors, tables, graphics, links, or anything beyond simple text edits, you must switch to the HTML editor by clicking the Source button.

Additional documentation for the WYSIWYG text editor can be found here:

http://docs.fckeditor.net/FCKeditor_2.x/Users_Guide

Naming conventions:

When naming the **identifier** for pages you are adding, use all lower case, first word is main section_ next section, etc. (Follow existing examples.)

Deleting a page:

Only administrators may delete pages. If you make a mistake or find a page that needs to be removed, contact your SmileMaker administrator.

Reverting back to previous version:

Only administrators may revert pages to previous versions. If you make a mistake or find a page that needs to be backed out to a previous version, contact your SmileMaker administrator.

User administration:

Only administrators may add, edit or delete users. If you need help with your SmileMaker account, contact your SmileMaker administrator.

Review/approval of updates:

Only administrators may review and approve any changes to the site. If you have made an edit that needs to be reviewed/approved so it can be pushed to the live site, contact your SmileMaker administrator.