
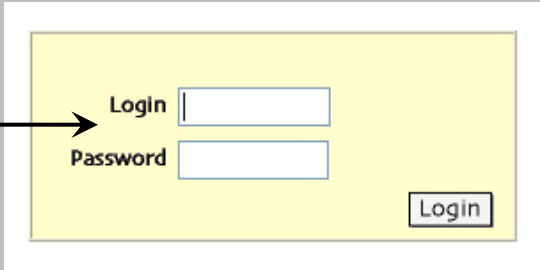
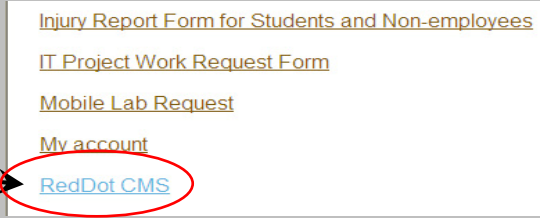



# Portland Public Schools

## RedDot Quick Reference Guide “Getting Started”

This software is web based so you may access your webpage from any computer. This guide will outline the steps to reach the RedDot CMS login page.

Getting Started		
<p><b>Step 1</b></p>	<p><i>If using a PC you can use Internet Explorer or Firefox. If using a Mac your only option is Firefox.</i></p> <p>Launch internet explorer or Firefox and open the PPS Inside page. <a href="http://inside.pps.k12.or.us">[http://inside.pps.k12.or.us]</a></p> <p>Click the “<b>Login</b>” link located in the upper left hand corner of the page.</p>	
<p><b>Step 2</b></p>	<p>The login window will appear.</p> <p>Use your PPS Email <b>user name</b> and <b>password</b> to login.</p> <p><i>If you do not remember your password please contact the IT Service Desk: <a href="mailto:itservicedesk@pps.k12.or.us">itservicedesk@pps.k12.or.us</a> or call 916-3375</i></p>	
<p><b>Step 3</b></p>	<p>There will be a list of links. Towards the bottom of the list you will find the “<b>RedDot CMS</b>” link.</p> <p>Click on the link.</p>	
<p><b>Step 4</b></p>	<p>The <b>RedDot</b> CMS login window will appear.</p> <p><i>Please bookmark this page</i></p> <p>Use your PPS Email <b>user name</b> and <b>password</b> to sign in.</p> <p>Click “<b>Start</b>”</p>	

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# Portland Public Schools

## RedDot Quick Reference Guide RedDot Department Page Maps

This Quick Reference Guide (QRG) will identify and “map” the areas on the 3 main types of RedDot pages for Departments where you can enter text and/or graphics. We will also identify other QRGs where you can obtain detailed information about a particular section.

The screenshot shows a RedDot Department Main Page for 'Family Support Centers'. The page has a blue header with the title 'Department Main Page'. Below the header, there is a navigation bar with buttons for 'Welcome', 'Students', 'Parents', and 'Community'. A search bar is located below the navigation bar. The main content area features a large image of two women, with a callout '3' pointing to the image and '4' pointing to the image's edit icon. To the right of the image is the title 'Family Support Centers' with a callout '5' pointing to the text below it. A callout '1' points to the page title 'Family Support Centers' at the top. A callout '2' points to the sub-page menu on the left. A callout '6' points to an edit icon for text at the bottom. A callout '7' points to edit icons for side column pages at the bottom right.

<b>Item 1</b>	Page Title	This is the Title of your page. Changing the Title will also change the page link name in the left Sub-Page menu.
<b>Item 2</b>	Sub-Page Menus	This area contains the link buttons to your Department’s Sub-Pages. You can create button links and Sub-Pages. Refer to QRG “Adding Sub-Pages”.
<b>Item 3</b>	Main Page Image	This is a required entry, and is initially created by the System Administrator when your Department page was created. Refer to QRG “Adding Images”.

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<b>Item 4</b>	Main Page Title	This is a required entry, and is initially created by the System Administrator when your Department page was created. Refer to QRG "Add and Edit Content on a Page".
<b>Item 5</b>	Main Page Text	This is the area where you would enter introductory text about your Department. Refer to QRG "Add and Edit Content on a Page".
<b>Item 6</b>	Page Text	This is the area where you would enter text related to your activities and/or information about Department. This area will extend to the right to the edge of your page, unless you've added right side column data. Refer to QRG "Add and Edit Content on a Page".
<b>Item 7</b>	Side Column Pages	This area is where you can create a sub-page within a page. These pages will appear in this right side column area. Refer to QRG "Side Column Pages".

## Department Sub Page

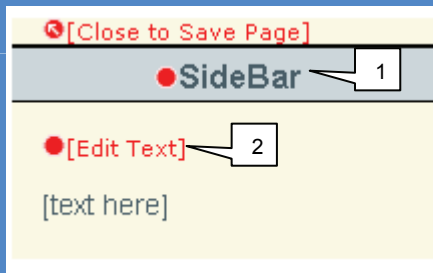
The screenshot shows a web page for 'Contact Us' under the 'Family Support Centers' department. The page includes a navigation menu with 'Welcome', 'Students', 'Parents', and 'Community'. A search bar is located below the menu. The main content area features a heading '[Page Heading]' and an '[Edit Text]' icon. A side column menu on the left lists 'Family Support Centers' and 'Contact Us'. A '[Manage Side Column Pages]' icon is visible in the right side column area. The footer contains contact information for the District Title VI & Title IX and District 504, along with the Portland Public Schools address and copyright notice.

<b>Item 1</b>	Page Title	This is the Title of your sub-page. Changing the Title will also change the page link name in the left Sub-Page menu.
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<b>Item 2</b>	Sub-Page Menus	This area contains the link buttons to your Department's Sub-Pages. You can create button links and Sub-Pages. Refer to QRG "Adding Sub-Pages".  <b>NOTE:</b> Adding a Sub-Page here will make a Sub-Page to your Sub-Page.
<b>Item 3</b>	Page Heading	This is the Title or Subject of your Sub-Page. Refer to QRG "Add and Edit Content on a Page".
<b>Item 4</b>	Page Text	This is the area where you would enter text related to your activities and/or information about this Sub-Page. This area will extend to the right to the edge of your page, unless you've added right side column data. Refer to QRG "Add and Edit Content on a Page".
<b>Item 5</b>	Side Column Pages	This area is where you can create a sub-page within a page. These pages will appear in this right side column area. Refer to QRG "Side Column Pages".

### Department Right Side Column Page






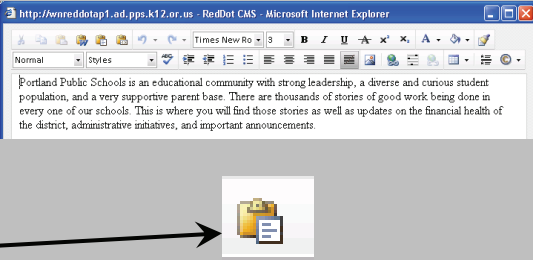
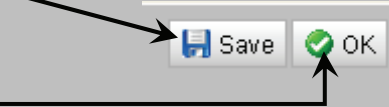
<b>Item 1</b>	Side Column Page Title	This is the title of your Side Column page. Refer to QRG "Side Column Pages" and "Add and Edit Content on a Page".
<b>Item 2</b>	Side Column Page Text	This is the text of your Side Column page. This is the area where you would enter text related to your activities and/or information about this Side Column Page. Refer to QRG "Side Column Pages" and "Add and Edit Content on a Page".

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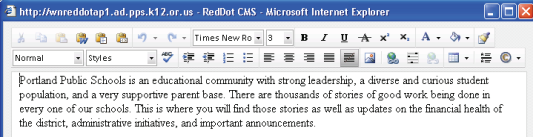


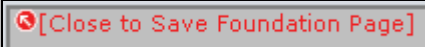

# Portland Public Schools

## RedDot Quick Reference Guide Add and Edit Content On a Page

Two of the tasks you will perform most often are to add or edit the content of your web page. This guide will outline the steps to easily and quickly add content to your page and then how to edit your page.

Add Content to a Page with RedDot		
<p><b>Step 1</b></p>	<p>In Internet Explorer, open the RedDot editor site.</p> <p>Enter your PPS E-Mail <b>User name</b> and <b>Password</b>.</p> <p>Click the <b>Start</b> button</p>	
<p><b>Step 2</b></p>	<p>Just as you would in the web, navigate to the page you wish to edit.</p>	
<p><b>Step 3</b></p>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>	
<p><b>Step 4</b></p>	<p>Locate the area you wish to add content and click the <b>Edit Text RedDot</b>.</p>	
<p><b>Step 5</b></p> <p>Using the <b>Text Editor</b>, enter your text.</p> <p>Use the <b>Toolbar</b> to format text as needed.</p> <p>You can copy text from another source and paste into the Text Editor. It is recommended that you use the <b>Paste As Text</b> icon to Paste, and then format your text as needed.</p>		
<p><b>Step 6</b></p> <p>When you have completed adding and editing your text, click the <b>Save</b> button in the lower right corner of the Text Editor.</p> <p>Then click the <b>OK</b> button. (Clicking OK will also Save &amp; Close)</p>		

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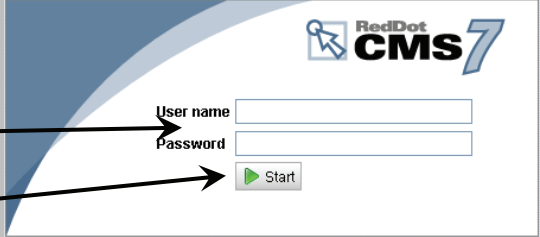



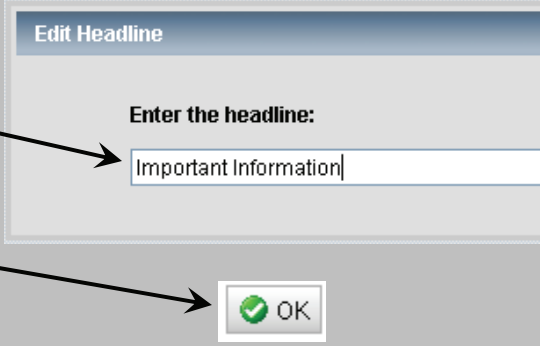
<p><b>Step 7</b></p>	<p>You will return to the RedDot page.</p> <p>Click the <b>Close to Save the Foundation Page RedDot.</b> </p> <p><b>NOTE:</b> When you Close the page in RedDot, it is automatically saved.</p>	
<p><b>Edit a Page with RedDot</b></p>		
<p><b>Step 8</b></p>	<p>If not Logged In, follow Step 1 above.</p>	
<p><b>Step 9</b></p>	<p>Just as you would in the web, navigate to the page you wish to edit.</p>	
<p><b>Step 10</b></p>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot.</b> </p>	
<p><b>Step 11</b></p>	<p>Locate the text you wish to edit and click the <b>Edit Text RedDot.</b> </p>	
<p><b>Step 12</b></p>	<p>Using the <b>Text Editor</b>, edit your text as needed.</p>	
<p><b>Step 13</b></p>	<p>When you have completed editing your text, click the <b>Save</b> button in the lower right corner of the Text Editor.</p> <p>Then click the <b>OK</b> button. (Clicking OK will also Save &amp; Close)</p>	
<p><b>Step 14</b></p>	<p>You will return to the RedDot page.</p> <p>Click the <b>Close to Save the Foundation Page RedDot.</b> </p> <p><b>NOTE:</b> When you Close the page in RedDot, it is automatically saved.</p>	
<p><b>NOTE</b></p>	<p>While there is a toolbar button to add images in Text Editor, it is highly recommended that you only add images in the Image Placeholder areas of your RedDot Template page. These are designated with an <b>Edit Image RedDot.</b> </p>	

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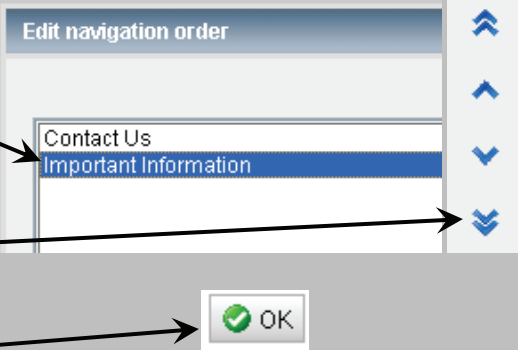
# Portland Public Schools

## RedDot Quick Reference Guide Adding Sub-Pages





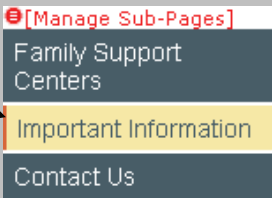


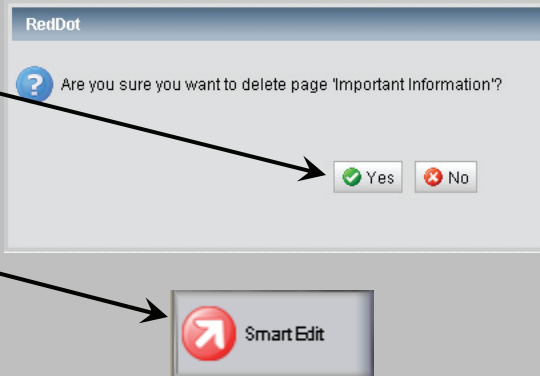
On the left side of your pages is a Links Button bar that links to Sub-Pages within the Web site. This guide will outline the steps to add buttons and create your sub-pages.

Creating Sub-Page Link Buttons and Pages		
<b>Step 1</b>	<p>In Internet Explorer, open the RedDot editor site.</p> <p>Enter your PPS E-Mail <b>User name</b> and <b>Password</b>.</p> <p>Click the <b>Start</b> button</p>	 <p>The screenshot shows the RedDot CMS 7 login interface. It features a 'User name' text box, a 'Password' text box, and a green 'Start' button. Arrows from the text in Step 1 point to these elements.</p>
<b>Step 2</b>	<p>Just as you would in the web, navigate to the page you wish to add sub-pages.</p>	
<b>Step 3</b>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>	 <p>The screenshot shows a button with a red dot icon and the text '[Open to Edit Foundation Page]'. An arrow from the text in Step 3 points to this button.</p>
<b>Step 4</b>	<p>In the left column, click the <b>Manage Sub-Pages RedDot</b>.</p>	 <p>The screenshot shows a button with a red dot icon and the text '[Manage Sub-Pages]'. An arrow from the text in Step 4 points to this button.</p>
<b>Step 5</b>	<p>The <b>Edit Link Element</b> window will open.</p> <p>Click the <b>Create and Connect Page</b> link.</p>	 <p>The screenshot shows a link with a document icon and a star, labeled 'Create and Connect Page'. An arrow from the text in Step 5 points to this link.</p>
<b>Step 6</b>	<p>The <b>Edit Headline</b> window opens.</p> <p>Enter the <b>Name</b> of your Sub-Page in the <b>Enter the headline</b> field.</p> <p>Click the <b>OK</b> button in the lower right corner.</p>	 <p>The screenshot shows the 'Edit Headline' window. It has a title bar 'Edit Headline' and a text input field labeled 'Enter the headline:' containing the text 'Important Information'. An arrow from the text in Step 6 points to this field. In the bottom right corner, there is an 'OK' button with a green checkmark icon. An arrow from the text in Step 6 points to this button.</p>

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<p><b>Step 7</b></p>	<p>Your new Sub-Page link is added.</p> <p>Your Foundation Page is saved and closed.</p>	
<p><b>Step 8</b></p>	<p>Next, click on the new link.</p> <p>Your new page will open, and you can now edit it as needed.</p>	<p>Refer to Quick Reference Guide “Add and Edit Content on a Page”</p>
<p><b>Changing Sub-Page Link Buttons Order</b></p>		
<p><b>Step 9</b></p>	<p>The new link is added to the bottom of your Sub-Page link button list. You can edit the order in which the buttons appear.</p>	
<p><b>Step 10</b></p>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>	
<p><b>Step 11</b></p>	<p>On the top menus, click the <b>Actions</b> menu.</p>	
<p><b>Step 12</b></p>	<p>The <b>Actions</b> menu window will open.</p> <p>Scroll down and click the <b>Edit Navigation Order</b> link.</p>	
<p><b>Step 13</b></p>	<p>The <b>Edit Page Order</b> window will open.</p> <p>Click on the <b>Sub-Page Name</b> to select it.</p> <p>Use the <b>UP / Down</b> arrows on the right to move the Sub-Page to the order you want.</p> <p>Click the <b>OK</b> button in the lower right corner.</p>	

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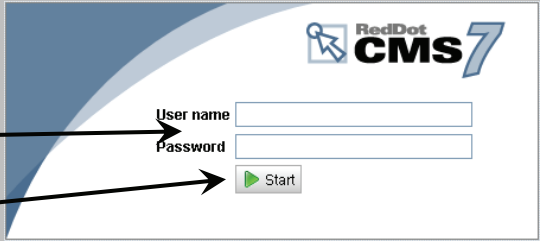



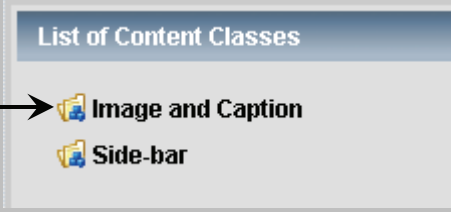
<p><b>Step 14</b></p>	<p>You will return to the RedDot page.</p> <p>Click the <b>Close to Save the Foundation Page RedDot.</b> </p> <p><b>NOTE:</b> When you Close the page in RedDot, it is automatically saved.</p>	
<p><b>Deleting a Sub-Page</b></p>		
<p><b>Step 15</b></p>	<p>There may be occasions when you need to delete a Sub-Page from your web site. You can remove the page link button from your Sub-Page list.</p>	
<p><b>Step 16</b></p>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot.</b> </p>	
<p><b>Step 17</b></p>	<p>In the left column, click the <b>Page Link</b> to open the page.</p>	
<p><b>Step 18</b></p>	<p>On the top menus, click the <b>Actions</b> menu.</p>	
<p><b>Step 19</b></p>	<p>The <b>Actions</b> menu window will open.</p> <p>Scroll down and click the <b>Delete Page</b> link.</p>	
<p><b>Step 19</b></p>	<p>The <b>Delete Page</b> window will open.</p> <p>Click the <b>Yes</b> button to delete the page.</p> <p>Then click the <b>Smart Edit</b> button to return to the main page. Your page is deleted and its link removed from the left column.</p>	

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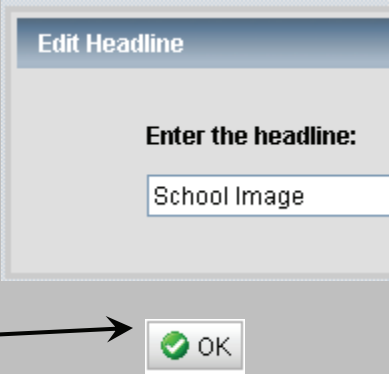


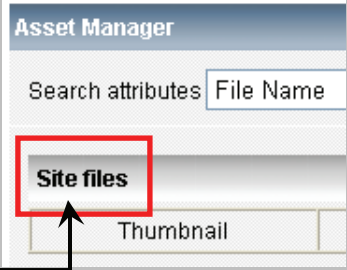

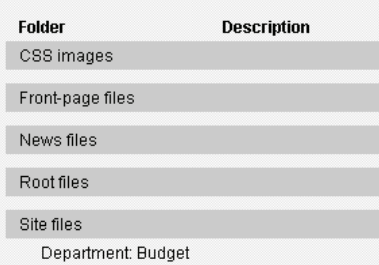
# Portland Public Schools

## RedDot Quick Reference Guide Manage Side Column Pages


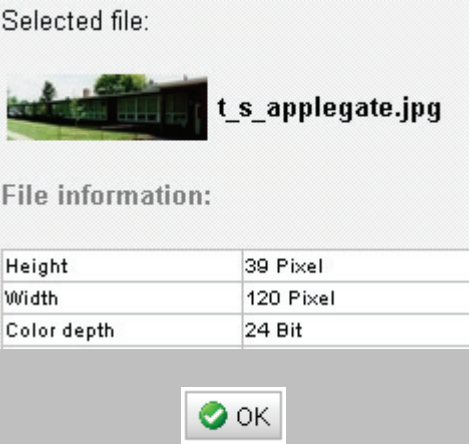
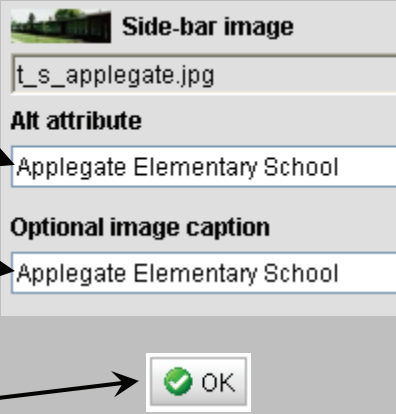

On the right side of your pages, you can create Side Column Pages, which are separate web pages that embed into your page and will format to fit in the right column. This guide will outline the steps to create the two types of Side Column Pages: Image and Caption page and Side-Bar page.

Create an Image and Caption Side Column Page		
<b>Step 1</b>	In Internet Explorer, open the RedDot editor site.  Enter your PPS E-Mail <b>User name</b> and <b>Password</b> .  Click the <b>Start</b> button	 The image shows the RedDot CMS 7 login interface. It features a blue header with the RedDot CMS 7 logo. Below the logo are two input fields: 'User name' and 'Password'. A green 'Start' button is located at the bottom right. Arrows from the text in Step 1 point to the 'User name' field, the 'Password' field, and the 'Start' button.
<b>Step 2</b>	Just as you would in the web, navigate to the page you wish to edit.	
<b>Step 3</b>	In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b> .	 The image shows a red circular icon with a white 'E' inside, representing the 'Open to Edit' button. An arrow points from this icon to a button labeled '[Open to Edit Foundation Page]' which also has a red circular icon with a white 'E'.
<b>Step 4</b>	On the right side of your page, click the <b>Manage Side Column Pages RedDot</b> .	 The image shows a red circular icon with a white 'E' inside, representing the 'Manage Side Column Pages' button. An arrow points from this icon to a button labeled '[Manage Side Column Pages]' which also has a red circular icon with a white 'E'.
<b>Step 5</b>	The <b>Edit Link Element</b> window will open.  Click the <b>Create and Connect Page</b> link.	 The image shows a button labeled 'Create and Connect Page' with a document icon and a star icon.
<b>Step 6</b>	The <b>List of Content Classes</b> window will open.  Click the <b>Image and Caption</b> link.	 The image shows a window titled 'List of Content Classes'. It contains two options: 'Image and Caption' and 'Side-bar', each with a small document icon.






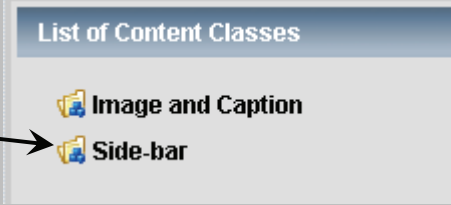
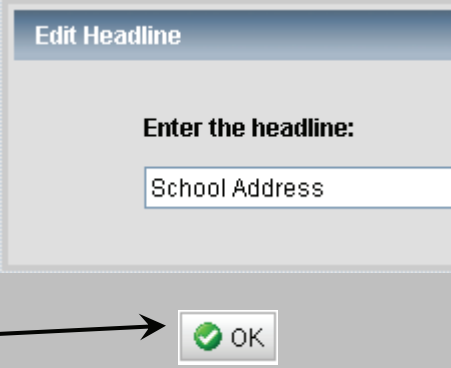

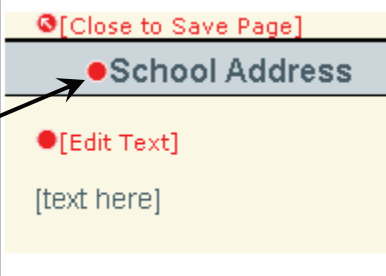
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<p><b>Step 7</b></p>	<p>In the <b>Edit Headline</b> field, enter a <b>Name</b> for your page.</p> <p>After naming your Page, click the <b>OK</b> button in the lower right corner.</p>													
<p><b>Step 8</b></p>	<p>You are returned to the Foundation Page. Now you can select your <b>Image and Caption</b>.</p> <p>Click the <b>Form Red Dot</b> to open the Form.</p>													
<p><b>Step 9</b></p>	<p>The <b>Edit Elements via Form</b> window opens. First you'll add your image.</p> <p>Click the <b>Edit Element Content</b> button to the right of the <b>Side-bar image</b> field.</p>													
<p><b>Step 10</b></p>	<p>The Asset Manager window opens.</p> <p><b>NOTE:</b> For additional information on adding images, refer to the <b>Adding Images and Documents</b> Quick Reference Guide.</p> <p>The <b>Active (Current) folder</b> is shown above the menus.</p>													
<p><b>Step 11</b></p>	<p>To change to another folder, click the <b>Switch Folder</b> menu button.</p>													
<p><b>Step 12</b></p>	<p>From the folder list, click on the desired folder.</p>	 <table border="1"> <thead> <tr> <th>Folder</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>CSS images</td> <td></td> </tr> <tr> <td>Front-page files</td> <td></td> </tr> <tr> <td>News files</td> <td></td> </tr> <tr> <td>Root files</td> <td></td> </tr> <tr> <td>Site files</td> <td>Department: Budget</td> </tr> </tbody> </table>	Folder	Description	CSS images		Front-page files		News files		Root files		Site files	Department: Budget
Folder	Description													
CSS images														
Front-page files														
News files														
Root files														
Site files	Department: Budget													

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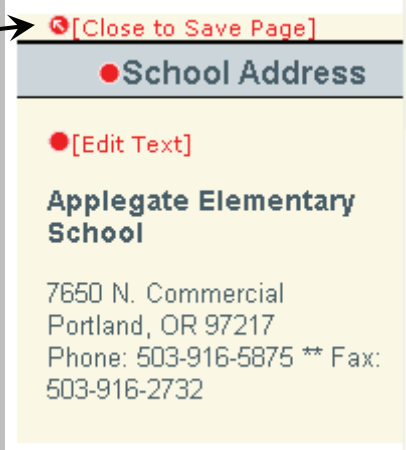
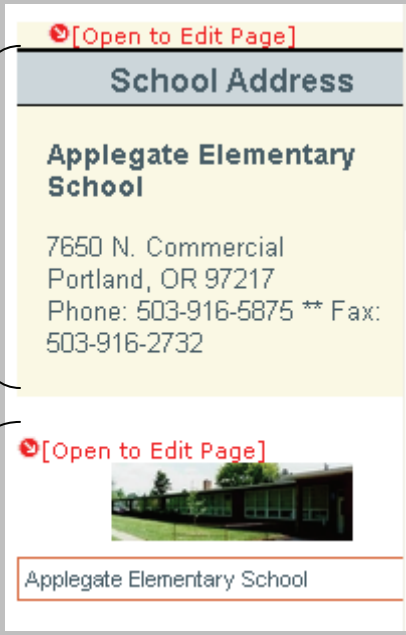


<p><b>Step 13</b></p>	<p>To select the image to use, click on the <b>File Name</b> of the image to select it.</p> <p><b>NOTE:</b> Clicking the thumbnail will only display a larger thumbnail of your image. Only by clicking the File Name can you select it for use.</p>	
<p><b>Step 14</b></p>	<p>Once selected, information about the file will display in the right column of the Asset Manger window.</p> <p>Click the <b>OK</b> button in the lower right hand corner.</p>	
<p><b>Step 15</b></p>	<p>The file name will display in the Masthead Image field.</p> <p>Enter text in the <b>Alt Attribute</b> field. That will display when a user "hovers" over your image.</p> <p>Enter an <b>Optional Image Caption</b> in the field. This will appear just below the image in you finished page.</p> <p>Click the <b>OK</b> button to add your image and caption to the RedDot page.</p>	
<p><b>Step 16</b></p>	<p>You are returned to your page. Click the <b>Close to Save Page RedDot.</b></p> <p>Your new Side Column page and the Foundation Page are closed and saved.</p>	

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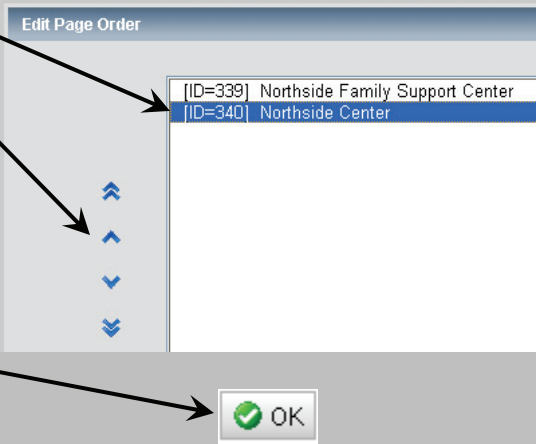

<h2 style="text-align: center; background-color: #003366; color: white; padding: 5px;">Create an Image and Caption Side Column Page</h2>		
<p><b>Step 17</b> If not logged in, follow steps 1 and 2 above.</p> <p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>		
<p><b>Step 18</b> On the right side of your page, click the <b>Manage Side Column Pages RedDot</b>.</p>		
<p><b>Step 19</b> The <b>Edit Link Element</b> window will open.</p> <p>Click the <b>Create and Connect Page</b> link.</p>		
<p><b>Step 20</b> The <b>List of Content Classes</b> window will open.</p> <p>Click the <b>Side-bar</b> link.</p>		
<p><b>Step 21</b> In the <b>Edit Headline</b> field, enter a <b>Name</b> for your page.</p> <p>After naming your Page, click the <b>OK</b> button in the lower right corner.</p>		
<p><b>Step 22</b> You are returned to your page. The <b>Page Name</b> you entered above is listed as your page <b>Headline</b>.</p> <p>To Edit that, click the <b>Edit hdl_title RedDot</b> next to the Page Headline.</p>		

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<p><b>Step 27</b></p>	<p>You are returned to your page. Click the <b>Close to Save Page RedDot</b>.</p> <p>Your new Side Column page and the Foundation Page are closed and saved.</p>	
<p><b>Step 28</b></p>	<p>You now have Side Column Pages in your main page.</p> <p><b>Side-bar Page</b></p> <p><b>Image and Caption Page</b></p>	
<p><b>How to Change Side Column Page Order</b></p>		
<p><b>Step 29</b></p>	<p>If not logged in, follow steps 1 and 2 above.</p> <p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>	
<p><b>Step 30</b></p>	<p>On the right side of your page, click the <b>Manage Side Column Pages RedDot</b>.</p>	

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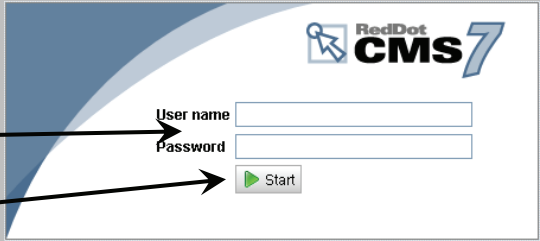


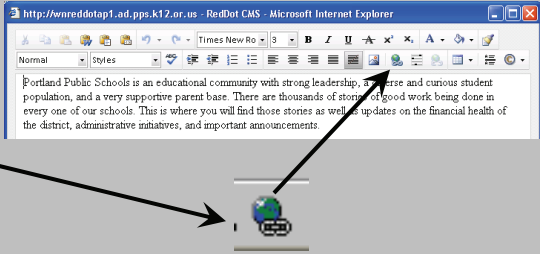
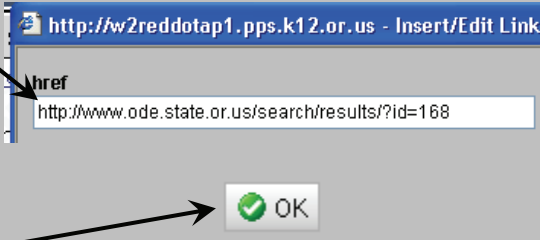
<b>Step 31</b>	The <b>Edit Link Element</b> window will open.  Click the <b>Edit Page Order</b> link.	
<b>Step 32</b>	Click on the Page you wish to move.  Use the <b>UP/Down Arrows</b> to move the pages to the order you wish them to appear.  Click the <b>OK</b> button in the lower right corner.	
<b>Step 33</b>	Click the <b>Close to Save Foundation Page RedDot</b> .	

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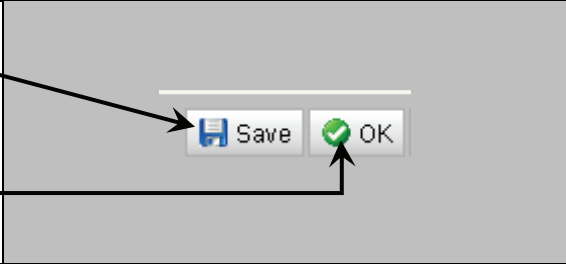
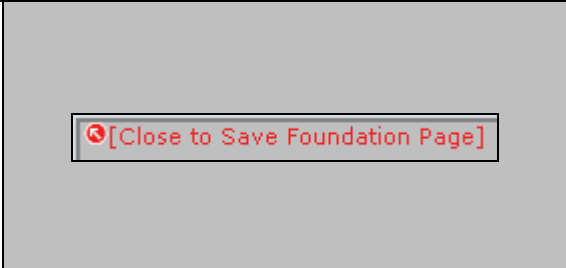
# Portland Public Schools

## RedDot Quick Reference Guide Creating Links

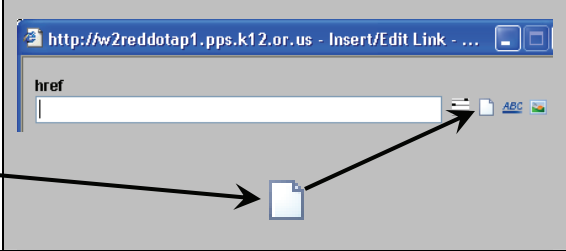
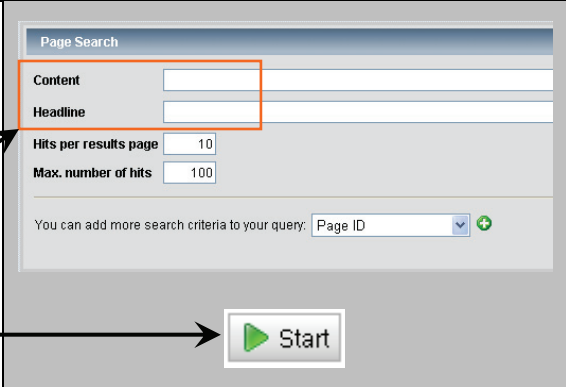
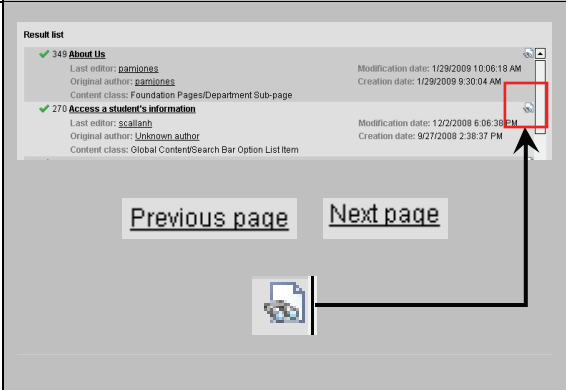
A task you will probably do often is to have links on your pages that take your audience to other web sites or to stored documents. This guide will demonstrate the steps to create a link to another web page/site and to create links to documents.

Create Links to External Web Pages		
<b>Step 1</b>	<p>In Internet Explorer, open the RedDot editor site.</p> <p>Enter your PPS E-Mail <b>User name</b> and <b>Password</b>.</p> <p>Click the <b>Start</b> button</p>	
<b>Step 2</b>	<p>Just as you would in the web, navigate to the page you wish to edit.</p>	
<b>Step 3</b>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>	
<b>Step 4</b>	<p>Locate the area you wish to add content and click the <b>Edit Text RedDot</b>.</p>	
<b>Step 5</b>	<p>Using the <b>Text Editor</b>, highlight (select) the text you want to have as your link.</p> <p>Click the <b>Insert/Edit Link</b> button on the toolbar.</p>	
<b>Step 6</b>	<p>Enter the <b>Web Address</b> in the href field.</p> <p><b>NOTE:</b> YOU may wish to navigate to the target page in another browser window, and copy &amp; paste the link.</p> <p>Click the <b>OK</b> button in the lower right corner.</p>	

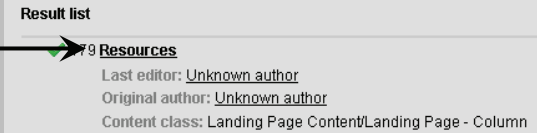

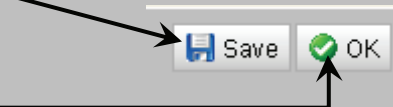

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webteam@pps.k12.or.us

<p><b>Step 7</b></p>	<p>When you have completed adding the link to your text, click the <b>Save</b> button in the lower right corner of the Text Editor.</p> <p>Then click the <b>OK</b> button. (Clicking OK will also Save &amp; Close)</p>	
<p><b>Step 8</b></p>	<p>You will return to the RedDot page.</p> <p>Click the <b>Close to Save the Foundation Page RedDot.</b></p> <p><b>NOTE:</b> When you Close the page in RedDot, it is automatically saved.</p>	

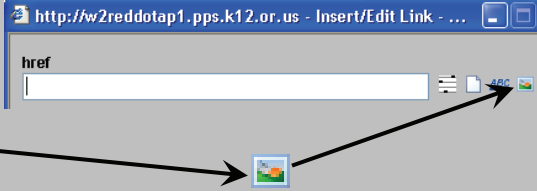
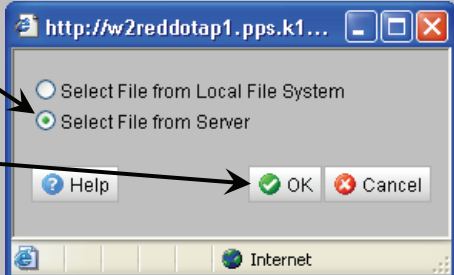
**Create Links to Internal Web Pages**

<p><b>Step 9</b></p>	<p>Follow Steps 1-5 above to navigate to the Text Editor and open the Create/Edit Link window.</p> <p>Click the <b>Insert Link to Page</b> button on the right of the href field.</p>	
<p><b>Step 10</b></p>	<p>The <b>Page Search</b> window will open.</p> <p>Enter any search criteria to search for the RedDot page. You can enter page <b>Content</b> and/or the page <b>Headline</b>.</p> <p>After entering your search criteria, click the <b>Start</b> button.</p>	
<p><b>Step 11</b></p>	<p>The Search Results window will open and display pages based on your search criteria.</p> <p>Use the <b>Previous Page</b> or <b>Next Page</b> buttons to navigate the Search Results.</p> <p>You can use the <b>Preview</b> button to view the page, if you cannot recognize it by the name.</p>	

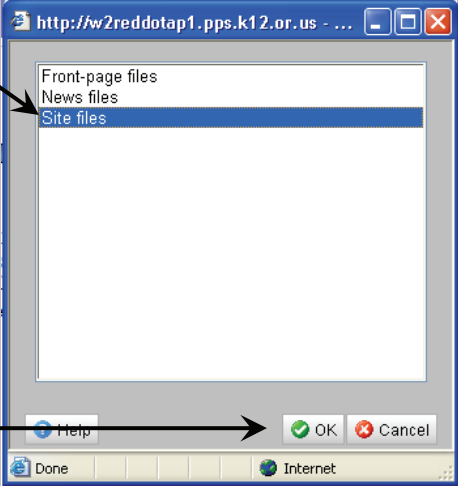
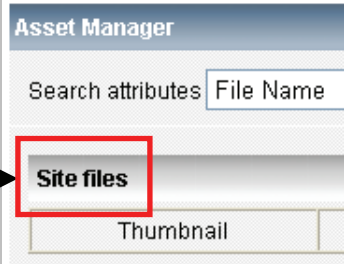

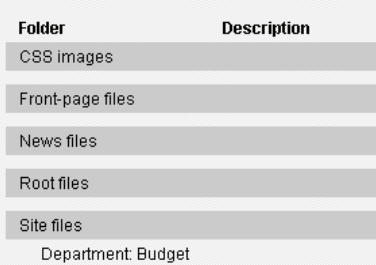
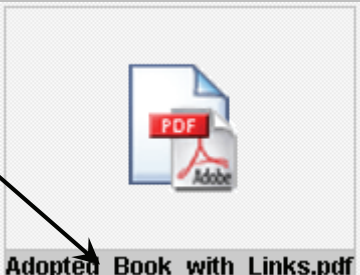
**FOR ASSISTANCE CONTACT THE WEBTEAM, 503.916.3015 or webteam@pps.k12.or.us**

<p><b>Step 12</b></p>	<p>When you've located your page, click the <b>Page Link</b> to select the page.</p>	
<p><b>Step 13</b></p>	<p>The Page link (RedDot ID) is pasted in the <b>href</b> field.</p> <p>Click the <b>OK</b> button.</p>	
<p><b>Step 14</b></p>	<p>When you have completed adding the link to your text, click the <b>Save</b> button in the lower right corner of the Text Editor.</p> <p>Then click the <b>OK</b> button. (Clicking OK will also Save &amp; Close)</p>	
<p><b>Step 15</b></p>	<p>You will return to the RedDot page.</p> <p>Click the <b>Close to Save the Foundation Page RedDot.</b></p> <p><b>NOTE:</b> When you Close the page in RedDot, it is automatically saved.</p>	



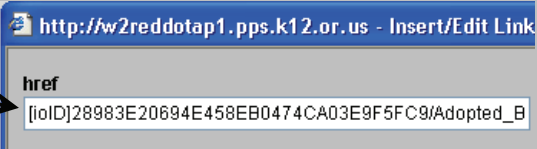

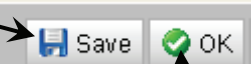



**Create Links to Documents**

<p><b>Step 16</b></p>	<p>Follow Steps 1-5 above to navigate to the Text Editor and open the Create/Edit Link window.</p> <p>Click the <b>Insert File Link</b> button on the right of the <b>href</b> field.</p>	
<p><b>Step 17</b></p>	<p>The <b>Select File</b> window will open. Ensure that <b>Select File from Server</b> is selected.</p> <p>Click the <b>OK</b> button.</p>	

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<p><b>Step 18</b></p>	<p>Select the main folder for your files.</p> <p>Click the <b>OK</b> button.</p>															
<p><b>Step 19</b></p>	<p>The Asset Manager window opens.</p> <p>The <b>Active (Current) folder</b> is shown above the menus.</p>															
<p><b>Step 20</b></p>	<p>To change to another folder, click the <b>Switch Folder</b> menu button.</p>															
<p><b>Step 21</b></p>	<p>From the folder list, click on the desired folder.</p>	 <table border="1" data-bbox="976 1157 1349 1419"> <thead> <tr> <th>Folder</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>CSS images</td> <td></td> </tr> <tr> <td>Front-page files</td> <td></td> </tr> <tr> <td>News files</td> <td></td> </tr> <tr> <td>Root files</td> <td></td> </tr> <tr> <td>Site files</td> <td></td> </tr> <tr> <td colspan="2">Department: Budget</td> </tr> </tbody> </table>	Folder	Description	CSS images		Front-page files		News files		Root files		Site files		Department: Budget	
Folder	Description															
CSS images																
Front-page files																
News files																
Root files																
Site files																
Department: Budget																
<p><b>Step 22</b></p>	<p>To select the document to use, click on the <b>File Name</b> of the document to select it.</p> <p><b>NOTE:</b> Clicking the thumbnail will only display a larger thumbnail of your document. Only by clicking the File Name can you select it for use.</p>															

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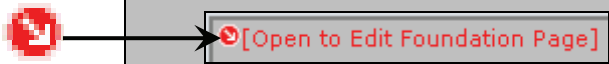
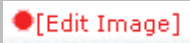
<p><b>Step 23</b></p>	<p>Once selected, information about the file will display in the right column of the Assset Manger window.</p> <p>Click the <b>OK</b> button in the lower right hand corner.</p>	<p>Selected file:</p>  <p><b>Adopted_Book_with_Links.pdf</b></p> <p>File information:</p> <table border="1"> <tr> <td>Original author</td> <td>Adobe InDesign CS3 (5.0.3)</td> </tr> <tr> <td>Created with</td> <td>Adobe PDF Library 8.0</td> </tr> <tr> <td>Number of pages</td> <td>179</td> </tr> </table> <p></p>	Original author	Adobe InDesign CS3 (5.0.3)	Created with	Adobe PDF Library 8.0	Number of pages	179
Original author	Adobe InDesign CS3 (5.0.3)							
Created with	Adobe PDF Library 8.0							
Number of pages	179							
<p><b>Step 24</b></p>	<p>The Page link (RedDot ID) is pasted in the href field.</p> <p>Click the <b>OK</b> button.</p>	 <p>href          [id]28983E20694E458EB0474CA03E9F5FC9/Adopted_B</p> <p></p>						
<p><b>Step 25</b></p>	<p>When you have completed adding the link to your text, click the <b>Save</b> button in the lower right corner of the Text Editor.</p> <p>Then click the <b>OK</b> button. (Clicking OK will also Save &amp; Close)</p>	 <p></p>						
<p><b>Step 26</b></p>	<p>You will return to the RedDot page.</p> <p>Click the <b>Close to Save the Foundation Page RedDot.</b> </p> <p><b>NOTE:</b> When you Close the page in RedDot, it is automatically saved.</p>							

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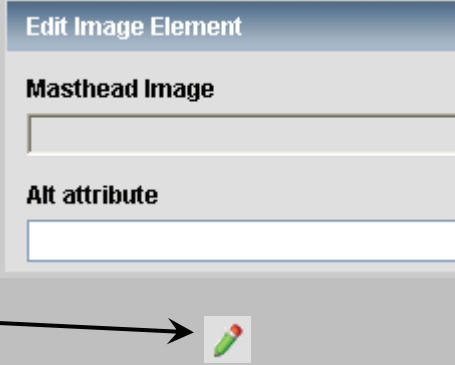
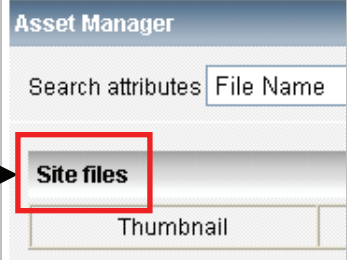

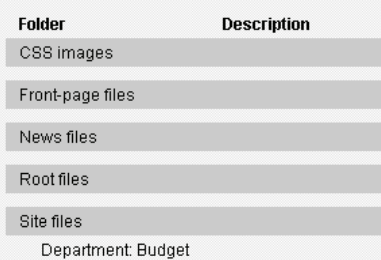
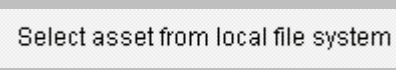
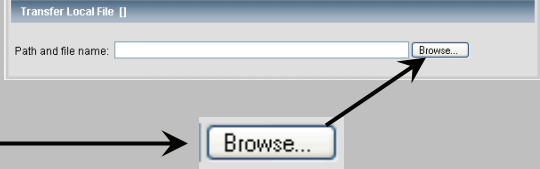
# Portland Public Schools

## RedDot Quick Reference Guide Adding Images and Documents

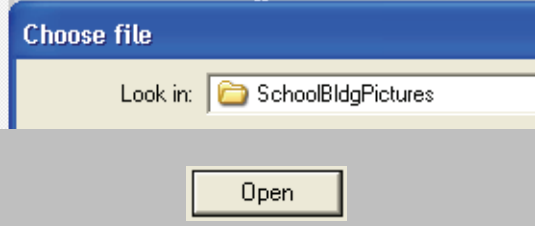
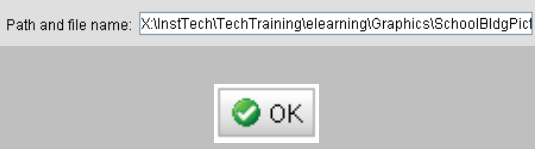


You can easily add images to your RedDot CMS pages by using the Edit Image RedDot. The easiest way to add images is to upload the image or document to your Assets folder first. The first section of this guide will outline the steps to add images or documents to the Assets folder, and then we'll demonstrate the steps to add images to your RedDot pages. Lastly we'll show how to upload images if in Text Editor mode.

Adding Images to Your RedDot Page Using the Image Placeholder		
<b>Step 1</b>	<p>In Internet Explorer, open the RedDot editor site.</p> <p>Enter your PPS E-Mail <b>User name</b> and <b>Password</b>.</p> <p>Click the <b>Start</b> button</p>	
<b>Documents</b>	<p>The next steps refer to adding images/graphics to your Folder. You will use the same steps (2 through 9) to upload documents (.PDF, .DOC, etc) to your Folder.</p>	
<b>Step 2</b>	<p>If you have not logged in, follow Step 1 above, and navigate to the page you want to add images to.</p>	
<b>Step 3</b>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>	
<b>Step 4</b>	<p>Locate the Image Placeholder you wish to add an image and click the <b>Edit Image RedDot</b>.</p>	

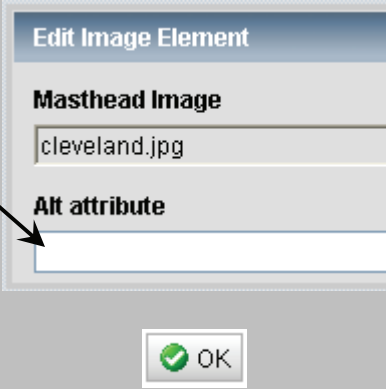
FOR ASSISTANCE CONTACT THE WEBTEAM, 503.916.3015 or  
webteam@pps.k12.or.us

<p><b>Step 5</b></p>	<p>The <b>Edit Image Element</b> window opens.</p> <p>Click the <b>Edit Element Content</b> button, to the right of the Masthead Image field.</p>													
<p><b>Step 6</b></p>	<p>The Asset Manager window opens.</p> <p>The <b>Active (Current) folder</b> is shown above the menus.</p>													
<p><b>Step 7</b></p>	<p>To change to another folder, click the <b>Switch Folder</b> menu button.</p>													
<p><b>Step 8</b></p>	<p>From the folder list, click on the desired folder.</p>	 <table border="1"> <thead> <tr> <th>Folder</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>CSS images</td> <td></td> </tr> <tr> <td>Front-page files</td> <td></td> </tr> <tr> <td>News files</td> <td></td> </tr> <tr> <td>Root files</td> <td></td> </tr> <tr> <td>Site files</td> <td>Department: Budget</td> </tr> </tbody> </table>	Folder	Description	CSS images		Front-page files		News files		Root files		Site files	Department: Budget
Folder	Description													
CSS images														
Front-page files														
News files														
Root files														
Site files	Department: Budget													
<p><b>Step 9</b></p>	<p>After navigating to the folder, to add an image, click the <b>Select asset from local file system</b> link (located just below the Menu bar).</p>													
<p><b>Step 10</b></p>	<p>The Transfer Local File window opens.</p> <p>Click the <b>Browse</b> button.</p>													



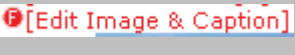
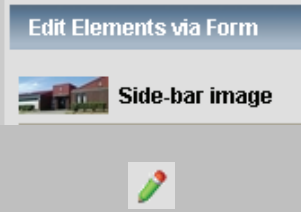

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<p><b>Step 11</b></p>	<p>Navigate to the folder where your image is located.</p> <p>Click on the file to select it, and then click the <b>Open</b> button.</p>							
<p><b>Step 12</b></p>	<p>The select file displays in the <b>Path and file name:</b> field.</p> <p>Click the <b>OK</b> button in the lower right corner.</p>							
<p><b>NOTE:</b></p>	<p>You can only load one image or document at a time.</p>							
<p><b>Step 13</b></p>	<p>To select the image to use, click on the <b>File Name</b> of the image to select it.</p> <p><b>NOTE:</b> Clicking the thumbnail will only display a larger thumbnail of your image. Only by clicking the File Name can you select it for use.</p>							
<p><b>Step 14</b></p>	<p>Once selected, information about the file will display in the right column of the Assset Manager window.</p> <p>Click the <b>OK</b> button in the lower right hand corner.</p>	 <table border="1" data-bbox="911 1325 1419 1398"> <tr> <td>Height</td> <td>148 Pixel</td> </tr> <tr> <td>Width</td> <td>387 Pixel</td> </tr> <tr> <td>Color depth</td> <td>24 Bit</td> </tr> </table>	Height	148 Pixel	Width	387 Pixel	Color depth	24 Bit
Height	148 Pixel							
Width	387 Pixel							
Color depth	24 Bit							

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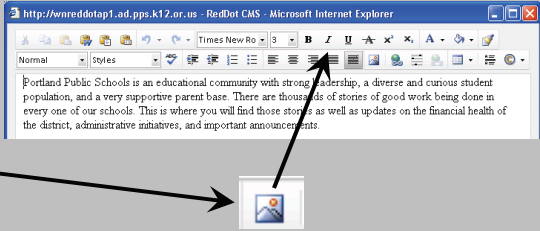
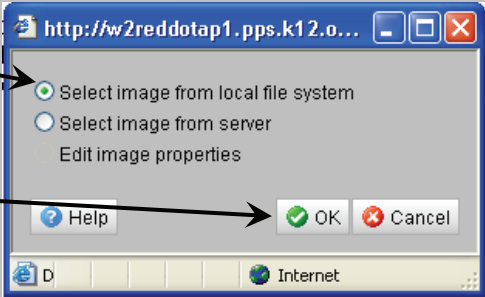

<p><b>Step 15</b></p>	<p>The file name will display in the Masthead Image field.</p> <p>Enter text in the <b>Alt Attribute</b> field. That will display when a user “hovers” over your image.</p> <p>Click the <b>OK</b> button to add your image to the RedDot page.</p>	
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**Adding Images to Your RedDot Page  
 Using the Page Form**

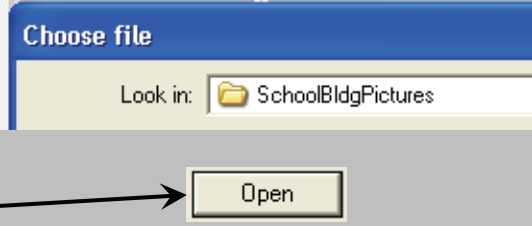
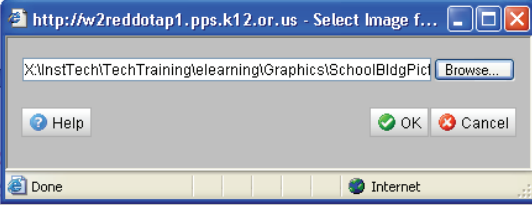
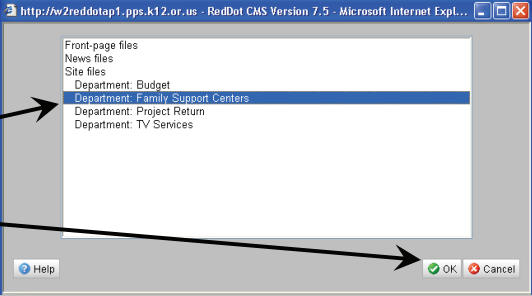
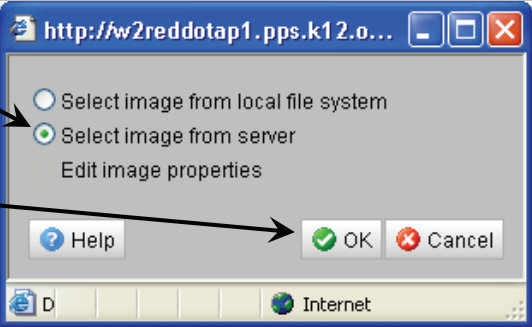
<p><b>Step 16</b></p>	<p>A <b>Page Form</b> is a special placeholder in your RedDot template.</p> <p>If you have not logged in, follow Step 1 above, and navigate to the page you want to add images to.</p>	
<p><b>Step 17</b></p>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot.</b></p>	
<p><b>Step 18</b></p>	<p>Locate the text you wish to edit and click the <b>Open to Edit Page RedDot.</b></p>	
<p><b>Step 19</b></p>	<p>Click the <b>Edit Image &amp; Caption Form RedDot.</b></p>	
<p><b>Step 20</b></p>	<p>The <b>Edit Elements via Form</b> window opens.</p> <p>Click the <b>Edit Element Content</b> button, to the right of the Side-Bar Image field.</p>	
<p><b>Step 21</b></p>	<p>The Asset Manger window opens.</p>	<p>Follow Steps 6-15 above to navigate and select your image.</p>
<p><b>Step 22</b></p>	<p>You will return to the RedDot page. Click the <b>Close to Save the Foundation Page RedDot.</b></p>	

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## Adding Images to Your RedDot Page Using the Text Editor

<b>NOTE:</b>	While there is a toolbar button to add images in Text Editor, it is highly recommended that you only add images in the Image Placeholder areas of your RedDot Template page. These are designated with an <b>Edit Image RedDot</b> .  <b>[Edit Image]</b>
<b>Step 23</b>	If you have not logged in, follow Step 1 above, and navigate to the page you want to add images to.
<b>Step 24</b>	In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b> .  
<b>Step 25</b>	Locate the text you wish to edit and click the <b>Edit Text RedDot</b> .  
<b>Step 26</b>	The <b>Text Editor</b> , Navigate to the place where you want to insert the image.  Click the <b>Insert/Edit Image</b> toolbar button. 
If image has <b><i>not</i></b> been uploaded to the <b>Asset Folder</b>	
<b>Step 27</b>	Click the radio button next to <b>Select image from local file system</b> .   Click the <b>OK</b> button.
<b>Step 28</b>	The Transfer Local File window opens.  Click the <b>Browse</b> button. 

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<p><b>Step 29</b></p>	<p>Navigate to the folder where your image is located.</p> <p>Click on the file to select it, and then click the <b>Open</b> button.</p>	
<p><b>Step 30</b></p>	<p>The select file displays in the field.</p> <p>Click the <b>OK</b> button in the lower right corner.</p>	
<p><b>Step 31</b></p>	<p>A window will open asking you to identify the folder you wish to store the file.</p> <p>Click the <b>Folder</b> to select it.</p> <p>Click the <b>OK</b> button.</p>	
<p><b>Step 32</b></p>	<p>The image is inserted into your Text Editor <i>and</i> saved into your Asset Folder for later use.</p>	
<p>If image <i>has</i> been uploaded to the <b>Asset Folder</b></p>		
<p><b>Step 33</b></p>	<p>Click the radio button next to <b>Select image from server</b>.</p> <p>Click the <b>OK</b> button.</p>	

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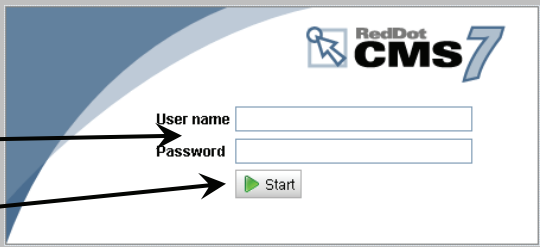





<p><b>Step 34</b></p>	<p>Select the main folder for your files.</p>          <p>Click the <b>OK</b> button.</p>	
<p><b>Step 35</b></p>	<p>The Asset Manger window opens.</p> <p>Follow Steps 3-5 above to navigate to the Asset Folder containing your image.</p>          <p>Follow Steps 16-18 above to navigate and select your image and add into your Text Editor.</p>	
<p><b>Step 36</b></p>	<p>Click the <b>OK</b> button to save and return to the RedDot page.</p>	
<p><b>Step 37</b></p>	<p>You will return to the RedDot page. Click the <b>Close to Save the Foundation Page RedDot.</b> </p>	

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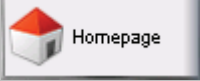
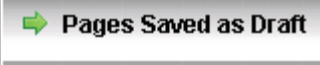
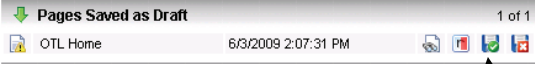
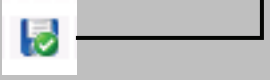
# Portland Public Schools

## RedDot Quick Reference Guide Publishing Your RedDot Pages

After you have created and/or edited your web pages(s), they are saved as a “draft” page. You need to “publish” them to the web site in order for visitors to see your changes. Within RedDot is a Workflow feature, in which pages may need approval from supervisors in your department/school before they are actually published. This guide will outline the steps to send your saved pages into workflow for approval and publishing.

Submit to Workflow		
<p><b>Step 1</b></p>	<p>In Internet Explorer, open the RedDot editor site.</p> <p>Enter your PPS E-Mail <b>User name</b> and <b>Password</b>.</p> <p>Click the <b>Start</b> button</p>	
<p><b>Step 2</b></p>	<p>Just as you would in the web, navigate to the page you wish to edit.</p>	
<p><b>Step 3</b></p>	<p>In the upper left corner, click the <b>Open to Edit Foundation Page RedDot</b>.</p>	
<p><b>Step 4</b></p>	<p>Locate the area you wish to add content and click the <b>Edit Text</b> or <b>Edit Image RedDot</b>.</p>	
<p><b>Step 5</b></p>	<p>When you have completed editing your text, click the <b>Save</b> button in the lower right corner of the Text Editor.</p> <p>Then click the <b>OK</b> button. (Clicking OK will also Save &amp; Close)</p>	
<p><b>Step 6</b></p>	<p>You will return to the RedDot page.</p> <p>Click the <b>Close to Save the Foundation Page RedDot</b>.</p> <p><b>NOTE:</b> When you Close the page in RedDot, it is automatically saved.</p>	

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






<p><b>Step 7</b></p>	<p>On the left navigation bar, click the <b>Homepage</b> icon.</p>	
<p><b>Step 8</b></p>	<p>If the green arrow is pointing to the right next to <b>Pages Saved as Draft</b>, click the arrow to expand the section.</p>	
<p><b>Step 9</b></p>	<p>Pages that you have edited and saved as draft are listed.</p>	
<p><b>Step 10</b></p>	<p>To start the Publish process, click the <b>Submit to workflow</b> icon.</p> <p>If your department/school is set up for Workflow, your page is sent to your supervisor/approver to publish to the web.</p> <p>If your department/school is not set up for workflow, clicking the Submit to workflow icon will publish your page.</p>	

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






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## RedDot Quick Reference Guide Text Editor Icons

Once you open the Text Editor you can enter text with formatting, styles, links, images and tables and see what it will look like while you work. You can also copy-and-paste text from your word processor, a webpage or practically any other application that contains text or HTML. This guide explains the toolbar icons that you will use in the Text Editor.

Text Editor Icons	
Icon	Function
	Deletes existing content. New content can be entered
	Inserts local files (.txt, .htm, .html)
	Inserts the content of Text elements from project pages with Released status
	Sends contents contained in the Text Editor to the printer
	Cuts content and copies it to the clipboard
	Copies content to the clipboard
	Inserts content from the clipboard. The formatting that conforms to HTML standards and the text element settings will be adopted.
	Inserts content from the clipboard. Formatting is removed before the text is inserted.
	Reverses the last editing step
	Restores the last editing step
	Performs a spell check
	Opens the symbol table
	Applies different tags to selected text
	Changes the direction of a text.
	Removes the formatting of selected text
	Applies bold formatting to selected text
	Applies italic formatting to selected text
	Underlines selected text
	Subscripts selected text
	Superscripts selected text
	Applies the selected font size to selected text

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	Applies the selected font type to selected text
	Aligns text and images on the left side of the page
	Aligns text and images in the middle of the page
	Justifies text and images
	Aligns text and images on the right side of the page
	Inserts a tabulator
	Removes a tabulator
	Applies a numbered or bulleted list to selected paragraphs
	Applies the selected colored to selected text
	Highlights selected text with selected color
	Inserts a table
	Edits the properties of a table
	Inserts a line above the insertion point
	Inserts a line below the insertion point
	Removes a line
	Inserts a column to the left of the insertion point
	Inserts a column to the right of the insertion point
	Removes a column
	Inserts a cell to the left of the insertion point
	Inserts a cell to the right of the insertion point
	Removes a cell
	Places the text at headline level
	Inserts a horizontal line
	Assigns a no automatic line break property to the selected text
	Removes a link
	Inserts a link
	Inserts a jump mark
	Inserts an image or edits the properties of an image
	In the lower section of the RedDot Text Editor, you now have a zoom function next to the Help button. A slider allows you zoom in and out of the Text Editor, with zoom percentages ranging between 50 and 150. The display is only enlarged or reduced while the Text Editor is open. When you close the Text Editor, this setting is not saved. To reset the zoom to 100 %, double-click the slider.









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## RedDot Quick Reference Guide

### RedDot Icons

In order to effectively use the RedDot Content Management System (CMS), you should become familiar with the RedDot icons that will appear when you edit pages. This guide will give a brief description of the icons that you may encounter while creating and editing web pages.

RedDot Icons and Descriptions		
RedDot Icon	Icon Name	Description
	<b>OpenPage RedDot</b>	Opens a RedDot Page for editing. At the top of the Page you may see a red dot with an arrow in it. This is called the OpenPage RedDot. If you click this dot the Page will be opened so that you can edit content. After opening the Page you will be in Edit Mode. You will notice that the Page Menu appears at the top of the browser window. The OpenPage dot changes to become a ClosePage RedDot  (the arrow switches directions) which you can click to close the Page again.
	<b>ClosePage RedDot</b>	Closes the Editing Mode of a Page and submits to workflow by default (may save Pages as draft). After you have finished working on a Page, you can close it by clicking the ClosePage dot  . This will hide all of the other RedDots. You can also close a Page by simply clicking on a link to go to another Page in the site. After closing your Pages by clicking the ClosePage dot or clicking a link on the webpage, RedDot CMS saves your changes.
	<b>Edit RedDot</b>	Opens the Editing Mode of a content element. The Edit RedDot is the plain RedDot that is visible after opening a Page. It is used to edit individual pieces of content in a Page. Examples of Placeholders that can be edited with this RedDot are Headlines, text content, images and more. Generally, an Edit RedDot is placed next to the content that it controls. Often, there is a label next to the dot, describing what it is for.
	<b>Form RedDot</b>	You can edit all of the content elements of a Page together in a single form. Form RedDots will allow you to open a dialog window that displays all editable Placeholders for that Page. You can get the same result if you open a Page for editing and click Edit Elements Via Form from the Action link in the Page menu.
	<b>Mandatory RedDot</b>	Opens elements that must contain content. You may notice a flashing red dot that looks like this:  . This red dot indicates that content is mandatory in that Placeholder. A value is required where the text is found. If this Placeholder does not contain a value, you will be warned that you cannot submit the Page to Workflow until a value is entered.

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	<b>LockedPage RedDot</b>	Identifies Pages or elements currently being edited by other Users. LockedPage RedDots indicate that you do not have permission to edit the corresponding Placeholders or that someone else is currently editing that Page.
	<b>MultiLink RedDot</b>	Opens the Editing Mode of an element that can link to multiple Pages. This dot is called the MultiLink RedDot, because it corresponds with an area where multiple RedDot CMS Pages can be connected. It is possible to Create and Connect new Pages, Connect to Existing Pages, Reference Pages, Reference Links, and modify the order the connected Pages appear.
	<b>Link RedDot</b>	Opens the editing mode of an element that can link to a single Page or URL. This RedDot corresponds to a link in a Page, where one (and only one) RedDot CMS Page can be created and connected. Creating and Connecting a Page to this link will replace the existing Page with a new one. RedDot CMS will prompt you to make sure that this is what you want it to do.
	<b>SaveElement RedDot</b>	Saves content that has been edited using DirectEdit.
	<b>DropZone</b>	Used for drag-and-drop content entry in SmartEdit.
	<b>Translate RedDot</b>	Opens elements in the Translation Editor that require translation.
	<b>AddPage / AppendPage RedDot</b>	AddPage allows you to insert Pages at the top of a manually sorted container. AppendPage is used to add Pages to the end of a manually sorted container.
	<b>ReleasePage RedDot</b>	Identifies a Page submitted for release. ReleasePage RedDots indicate that a Page is waiting for release by a content approver in a Workflow process. You will only see these RedDots after you submit a Page to Workflow from draft status and click the OpenPage RedDot for that Page.
	<b>Keyword RedDot</b>	Assigns Categories and Keywords to RedDot Pages.
	<b>Submit to Workflow</b>	Submits your page to Workflow for supervisory approval or publishes your page to the web.
	<b>Undo Changes</b>	Reverses (undo) any changes made to the page and removes it from the Pages Saved as Draft list.
	<b>Preview</b>	Allows you to preview the changed page as to how it will appear when published.
	<b>Preview in Redlining Mode</b>	Allows you to preview the changed page as to how it will appear when published with changes annotated in red.

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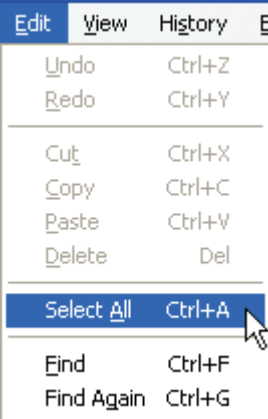
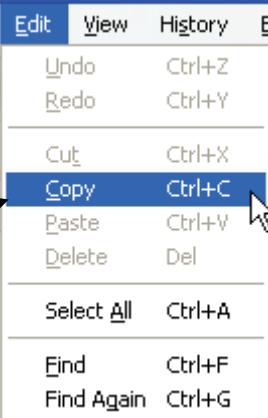
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## RedDot Quick Reference Guide “Calendar Templates used on PPS website”

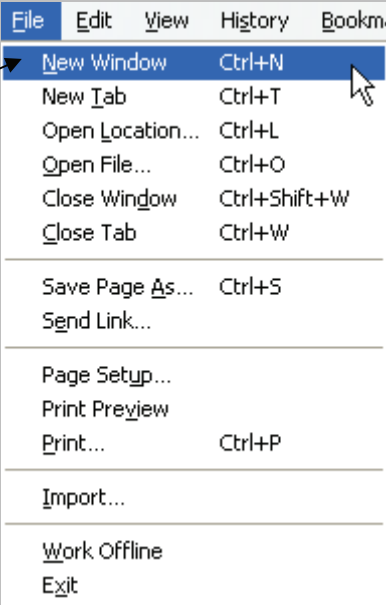
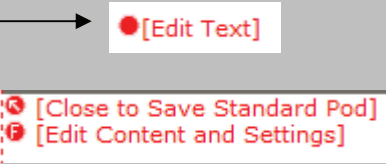
Calendar templates are found on Information Technology website.

<b>Using the Calendar Templates</b> (To be used with RedDot CMS School or Department website.)		
<b>Step 1</b>	<p>Open another browser window and go to :</p> <p><a href="http://www.pps.k12.or.us/departments/information-technology/2679.htm">http://www.pps.k12.or.us/departments/information-technology/2679.htm</a></p>	<p><b>You MUST use Internet Explorer or Firefox</b></p> <p>How to open another browser window: (PC = Ctrl+N) (Mac = Cmd+N) <b>or</b> Go to top menu bar and click on <b>File</b> and drop down to <b>New Window</b></p>
<b>Step 2</b>	<p>Create a bookmark/favorite to this location for easy access.</p>	<p><a href="http://www.pps.k12.or.us/departments/information-technology/2679.htm">http://www.pps.k12.or.us/departments/information-technology/2679.htm</a></p>
<b>Step 3</b>	<p>On this page you will see calendar templates which can be copied and pasted onto your webpage. <b>To do this, you MUST be using Internet Explorer or Firefox for your browser.</b> Select which calendar template link on this page that you want to copy and then follow these steps:</p> <p>(Sample images of “Weekdays” or “Full Week” calendars templates.)</p>	

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<p><b>Step 4</b></p>	<p>Click on the month link below the sample images that you want to copy (a new window will pop-up)</p>	
<p><b>Step 5</b></p>	<p><b>Select All</b> (PC = Ctrl+A) (Mac = Cmd+A)</p> <p><b>Or</b></p> <p><b>Go to top menu bar and click on Edit and drop down to Select All</b></p>	
<p><b>Step 6</b></p>	<p><b>Copy</b> (PC = Ctrl+C) (Mac = Cmd+C)</p> <p><b>Or</b></p> <p><b>Go to top menu bar and click on Edit and drop down to Copy</b></p>	

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<p><b>Step 7</b></p>	<p><b>Open another browser window</b> and login to RedDot</p> <p>(PC = Ctrl+N) (Mac = Cmd+N)</p> <p><b>or</b></p> <p><b>Go to top menu bar</b> and click on <b>File</b> and drop down to <b>New Window</b></p>	<p><b>Browser must be:</b>  <b>Internet Explorer or Firefox</b></p> 
<p><b>Step 8</b></p>	<p>Click on the red dot "• [Edit Text]" or "• [Edit Content and Settings]" to open the page/pod that you want to paste this on, then do a "standard" paste (PC = Ctrl+V) (Mac = Cmd+V)</p>	
<p><b>Step 9</b></p>	<p><b>Add content</b> to the individual cells in the calendar</p>	<p><b>NOTE:</b> For schools the calendar will display their school colors when it's pasted in pods (for departments it will stay gray)</p>

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# Best practices for document file naming

Just like paper files, electronic files need to be well-organized and labeled correctly so that they are identifiable and accessible by all employees.

Efficient management of electronic records begins with accurate file-naming. The following file-naming convention incorporates best practices in electronic records management and information technology.

## 1: Do not use the following special characters in a file name:

! “ # % & ‘ \* + , ; < > = ? @ [ ] ^ ` { } |

The characters listed above are frequently used for specific tasks in an electronic environment; using them in a file name may result in lost files or errors.

## 2: Use dashes or underscores instead of periods or spaces.

Periods already have a specific function in a file name, which is to tell the computer program where the file-name extension begins. Spaces are frequently translated in a Web environment to be read as “%20”.

## 3: File names can be a combination of upper and lower case or all lower case.

Generally about 25 characters is a sufficient length to capture enough descriptive information for naming a record.

## 4: Include dates and format them consistently.

Some workgroups might find it more useful to have the date at the start of the file name, while others might prefer it at the end. Either way, it is a useful sorting tool when the files are organized. Just be sure to keep it consistent.

**Examples:** newsletter\_20090204.pdf (naming convention\_year, day, month)

20090204\_newsletter.pdf (year, day, month\_naming convention)

Each dept./school should develop a standard naming convention to be used.

## 5: Be consistent.

The most important rule of file-naming is to be consistent.