Content Management System (CMS) Training

Exercise Guide for Radford University’s CMS,
Adobe Experience Manager (AEM)
Access the training environment

- To access the training environment you will need to be on a campus computer OR on the VPN if on a personal computer or off-campus location.

- Bring your mobile phone or a passcode with you to access DUO 2 Factor Authentication to log into the training environment.

- Type the URL for the training environment into your web browser.
  https://author-train.radford.edu

- You will be redirected to single sign on (SSO).

- Log in with your Radford University user name and passcode.
• Once you’ve logged in you will see the CMS training start screen.
• Click on Sites.
Edit the view

- In the upper left area, click on drop down arrow next to the screen icon.
- Select Content Tree.
Edit the view

- In the upper right corner, beside Create, click the dropdown arrow next to the 3 columns.
- Select List View.
Create a New Page

- Under Content Tree, click on the Training folder, it turns gray and the expands to show pages beneath it.
Exercise 1: Create a page

- Click the blue Create button found in the upper right corner.
- Select Page when the drop down options appear.
Exercise 1: Create a page

- Select Administrative Department Home Page. It will turn blue with a check mark in the middle.
- Click Next in upper right corner.
Exercise 1: Create a page

• Name will render the URL of a page.
• It is important that the name remains all lower case, no more than two words (if possible), and the words (if more than one) should be separated by a dash or a hyphen. See example to the right.
  • Short, explanatory URLs are preferred and recommended. A page that is titled About Us, can simply be named “about”. It is clear to the end user what kind of content is on the page.
• Title is what the title of your page will be and should also briefly explain what the content is on the page.
• For the purposes of training, please title your page with your first and last name with the word Training behind it.
Exercise 1: Create a page

- Scroll down the page to **More Titles and Descriptions**.
- Include a brief paragraph in the Description section. This must include a complete sentence or two that accurately describes the content on the page.
- Enter content into the Window Title in the following way – Title of the Page | Radford University
- Click Create in upper right corner.

This is one area you don’t want to overlook! Including a title and description and window title for every page within your website is extremely important. It helps search engines recognize the content on your page and may help offer it as a result for web users. Be sure your descriptions are written in clear sentences and naturally include key terms or phrases that relates to the overall subject matter of the page.
Exercise 1: Congratulations, you’ve created a new page.

- Click Open.
Your new page is ready for components and editing. It will automatically open showing Assets on the left.
Change the view to show Components.

- In the upper left, where it says Assets, change the view to Components by clicking the second icon available.
  - It says components when you hover over it.
- When you click on Components, the available components will appear for you to add to the page.
Adding a Text component to the page

- You have two ways to add a component to a page:
  - Scroll through the listing on the left to find the component called Text OR
  - Left click within the body of the page and select the + to open a components box and find Text in the listing.
    - Example below shows the left click option and the listing that appears.
Adding a content to the Text component

- The Text component is now on the page and ready to be edited.
- There are two ways to add or edit text on a page.
  - Left click on the word Text (the component that was just added to the page, and an editing menu appears. Click the pencil icon (for in-line editing) OR
  - Click the wrench tool icon to open the text editor where you have a number of formatting options.
  - For training, please click the tool icon.
• After clicking the tool icon, the text editor (below) opens on your page.
• Type in a paragraph or two in the open area.
• Explore the formatting options like, bold, italic, underline, bulleted list, and numbered list.
• When done adding text, click the check mark in the upper right corner of the text editor.
  • Your content will now appear on the page.
Add an Image

• Click the section beneath the content you just added where it says Drag Components Here and select +
• From the listing of components, find Image.
  • The image component may appear very small and difficult to find. See below.
• Once you find the image component, click it and select the wrench tool icon to open the image box. Drag any image available in this training environment from the Assets section (you may have to switch from Components to Assets) into the section that says Drop an asset here.

• Do not click on Browse as this will allow you to select an image from your computer.

• You will never browse your computer for an asset. Ever! This is important to remember.

• Once you are working on your website in the live environment, you will **always** upload images or documents to your department’s digital asset manager (DAM) then insert the asset onto the page.

• Once you have added your image onto your training page, click the check mark in the upper right corner.
• Click the tool icon again to see options to further modify the image. You may have to scroll down to see some of these options.
  • Title: Disregard for this exercise.
  • Link to: Click on the browse icon to find a page within the CMS if you wish for the image to link to another page. If the page is not in the CMS, paste a URL into the box.
  • Description: Place text here if you wish to have a caption for your image
• These options will be at the top of the image component box.
  • Accessibility: Place text here describing the image or graphic with text over it for visitors that are visually impaired. Or if the image purely decorative and can be ignored by assistive technology, check the “image is decorative” box.
  • Advanced: Disregard for this exercise.
  • Component Styles: Disregard for this exercise.
• Once you’re done modifying the image, click the check in the upper right corner.
Add a Content Heading

• Click the section beneath the image you just added where it says Drag Components Here and select +
• From the listing of components, find Content Heading.
• Click the component and select the tool icon.
  • You can control the size of the header.
  • NOTE: Larger headings should not be placed after smaller ones.
  • You do not have to use the largest header on the page. You can use medium or small.
  • Headings help users and search engines read and understand the content on the page. They are signposts for a reader and make scanning a page easier.
  • Headings should not be used to make content stand out.
Expand the page for a full view

- Expand the page to see it in full view without the assets or components on the left.
- Click the page icon in the upper left corner. When hovered over it says “Toggle Side Panel”
Adding additional components in the body of the page: Accordion Rows

- Click the section beneath the headers you just added where it says Drag Components Here and select +
- From the listing of components, find Accordion Row.
- Accordion Rows are good for including content such as FAQs that does not necessarily need to be seen on the page but can be seen with a tap or click of a plus sign to expand the accordion view.
  - Left click the accordion component and select the tool icon. Add a Title. Select a Heading type. H2 or H3.
  - H2 is larger than an H3.
- Once you’ve added a title and selected the heading type, click the checkmark in the upper right corner.
- THIS IS VERY IMPORTANT – REFRESH THE PAGE before adding a text component within the accordion row component.
- Notice there is a Drag Component Here box INSIDE the accordion. Left click that box and select Text.
Preview the page

- You’re a good point to preview what your page looks like if it were live.
- In the upper right corner, See Edit and Preview.
  - Click Preview. This allows you to expand the accordion row you added and get an idea of what your page would like if you were to publish it, making it live on the website.

- Scroll through your page to see how it looks.
- Scroll to the accordion row and test opening and closing it.
Return to Edit Mode and add Columns

• In the upper right click Edit and return to editing mode.
• Beneath the accordion row in the area that says Drag Components Here, left click and select the +
• Scroll to find Column Control in the listing.
• Left click and select the tool icon and change the column control to 2 Columns 50%, 50% or 3 Columns, 33%, 33%, 33%
• Click checkmark.
• See the columns as you selected.
• Now you are able to drag a text or call out box into these columns.
Add Callout boxes

• Within the columns just added, in the areas that say Drag Components Here, left click each one and select the +
• Scroll to find Callout Box in the listing and add a callout box to each column.
  • Note: if you accidentally include a component you didn’t intend to, left click and select the trashcan to delete it.
• Callout boxes are useful for highlighting content such as short-term announcements or deadlines on a homepage or degree programs with multiple concentrations. The headings should be brief.
• Left click each call out box and add a heading and content within it.
  • Note: Callout boxes can be used in 1, 2, 3, or 4 column layouts and will respond accordingly.
Callout boxes

- Explore the Callout Box component.
- Callout boxes can include call to action button links, text links, and images.
Add a Pull Quote

• Beneath the image component, click and select the + and find Text.
  • Copy and paste the following placeholder text into the new text box.
    Quam ob rem vita quidem talis fuit vel fortuna vel gloria, ut nihil posset accedere, moriendi autem sensum celeritas abstulit; quo de genere mortis difficile dictu est; quid hominum suspicentur, videtis; hoc vere tamen licet dicere, P. Scipioni ex multis diebus, quos in vita celeberrimos laetissimosque viderit, illum diem clarissimum fuisse, cum senatu dimisso domum reductus ad vesperum est a patribus conscriptis, populo Romano, sociis et Latinis, pridie quam excessit e vita, ut ex tam alto dignitatis gradu ad superos videatur deos potius quam ad inferos pervenisse.

  Abusus enim multitudine hominum, quam tranquillis in rebus diutius rexit, ex agrestibus habitaculis urbes construxit multis opibus firmas et viribus, quorum ad praesens pleraeque licet Graecis nominibus appellentur, quae isdem ad arbitrium inposita sunt conditoris, primigenia tamen nomina non amittunt, quae eis Assyria lingua institutores veteres indiderunt.

• In the area beneath the new placeholder text that says Drag Components Here, left click and select +
• Find Pull Quote in the listing and select it.
• Add a quote (a beginning quote mark is not needed. The component automatically adds one.)
• Add attribution for the quote.
• Add additional content if needed. This is useful for titles or class year.
• Click the checkmark.
• The pull quote should float within the paragraph, with the text of the paragraph wrapping around the quote. (Note: this may not be working in the training environment.)
• Pull quotes should be used to highlight quotes in news stories or in testimonials.
Add a Table

- Beneath the text and pull quote components just added, click and select the + and find Table
- Left click and select the tool icon.
- Three columns and two rows automatically appear.
- Place your cursor in the first box and begin typing a heading.
- Do this for the other two columns.
- Select the table icon.

- A new set of options appears.
- Highlight the text in the first box.
- Select the table icon again.
- Change the cell type to Header.
- Do this for the other content in the top columns.
Add a Table

- Click the blue checkmark in the bottom right.
- Then click the checkmark in the upper right of the component box.
- The table now has a red header.
- Left click and select the tool icon and explore the other options with tables in the such as adding rows and columns, removing rows and columns.
  - It is recommended that you do not adjust the automatic width and height applied to tables.
- Once complete, your table should look similar to this.
Adding Sidebar Content

• Scroll back to the top of the page.
• Under the left navigation is where Sidebar components will go.
• Left click the box that says Drag components here under your training name.
Adding a Call to Action (CTA) button

- Left click the box that says Drag components here under your training name and select +
- From the listing find the section called Radford Sidebar.
- Select the Call to Action Button
- The small teal button will appear.
  - It will say [invalid path] until you input content and a link.
- Left click it and select the icon tool.
- Add a link to an external website or browse to add a link from within Radford.

- Add link text that is clear and concise.
- Click the checkmark once done.

- A page should include no more than 5 CTAs.
- These buttons are useful for calling out content and links you want users to click on, therefore they should contain useful info for the user.
You have completed exercises in the upgraded CMS training environment.

Please reference the updated Image Spec Guide [PDF] found at www.radford.edu/webcomm under the Most Requested Information section.

Please continue reading for more information about working within the CMS and web best practices.
Publishing **homepages** as a site owner

- This is what an owner will see when they attempt to publish their homepage. Located in the upper left corner of a page, it will now say ‘Request Publication’ and a workflow will be implemented that sends an email to the digital communication team to review the homepage before the page is approved for publication.

- Publication approval for a homepage is typically completed within two hours during normal business hours – Monday to Friday, 8 to 5 p.m. If you submit a request for publication during a holiday or weekend, it will be addressed the following business day.
Publishing child pages as a site owner

• This is what publish looks like for an owner’s child page from the Page Information section in the upper right corner of a page.

• They can publish any child page in their site without the need for the workflow to be implemented.
Editing pages as a site author

• Site authors can edit pages but are not permitted to publish content. If an author edits a page that requires publication, authors must notify site owners via email or in person that there are changes waiting the owners review and publication. If it’s a homepage an author has edited, an owner will need to request publication.
Overview

Inheriting content from parent pages:

• What is page inheritance?
  • Sections of a webpage where you can add content that will be inherited on child pages.

• Inheritance can be disabled if needed and new components added to replace the disabled component.

• Child pages inherit banner images and sidebar content

• Use content inheritance to your advantage - contact us, mailing address, follow us so that this content carries throughout a site
Overview

Vimeo videos

- All videos **must** have captions- no exceptions
- The Digital Comm team will review all videos that contain a Radford University core logo lockup.
- Send videos and SRT files to Digital Communications and Strategy team to be added to Vimeo:
  - mwspraker@radford.edu
  - jfowler18@radford.edu
Branding

Brand consistency

• What is positioning?
  • Positioning is how you want to be thought of in the minds of your most important audiences. It is not what you are or how you express it, it’s about what you want people to remember when they walk away.

• Use AP Style when writing content for your website

• Avoid using “RU” when not necessary- spell out Radford University

• Do not be afraid to reuse quality content
Digital Marketing Resources

- **Digital Communications and Marketing**- We provide assistance to all users with content and site navigation, digital marketing and social media:
  - Meghan Spraker- Director of Digital Communications and Marketing
  - Jessica Fowler- Digital Strategist

- **Creative Services**- Provides photography and multimedia/production services and can also provide logo lockups for departments.
  - Submit creative service request forms can be found at [www.radford.edu/creative-services](http://www.radford.edu/creative-services)

- **Technology Assistance Center**- Provides technical support for campus.
  - Call 7500 or submit a ticket via ITOneStop. Search it on the website.
Best Practices

Strategic Content

• Communication is key
• Only include relevant content
• Keep mobile users in mind
• Remove outdated content as soon as possible
• Complete a site review every semester or sooner if you have content that changes more often
• Always double-check spelling and grammar
Best Practices

Page Layouts

• Content Headings go in descending order (H2 is large, H3 is medium, H4 is small)
  • Some content headings are marked large, medium, and small
• Calls-to-action should be prominently displayed (ex: Visit Us, Apply Now)
• Only include hyperlinked PDFs when necessary for lengthy manuals or forms, otherwise information should be on a webpage
• Include keywords in content whenever possible to help with search engine optimization
Best Practices

Accessibility

• Images or graphics that include text on them, **must** include alt-text

• Create descriptive hyperlinks so users know where the links are taking them
  • **Do not use “click here” or “learn more”**

• Videos should **always** include captions

• Make sure that PDFs are accessible when possible
  • Can screen-readers read the content in them?
Best Practices

Writing for the web

• Quality over quantity

• Create content for your target audience

• Use bulleted or numbered lists to break up longer content making it easier to scan

• Update website content to keep pages interesting to users
  • Review your website content periodically to remove old content and outdated information that could lead to end-user confusion.

• Align content with department/program goals and mission

• Divide content into sections with subheadings

• Content headers should stand alone and use keywords.
  • Content headers should not be used to make content stand out!

• Incorporate brand language into content when appropriate

• Content should be organized in order of importance to the user
Best Practices

The Inverted Pyramid helps you prioritize content placement.
Troubleshooting
Steps to troubleshoot:

• Changes in author aren’t showing on live page:
  • Did you activate the correct page?
  • Has the activation gone through?
  • Did you clear your cache or refresh the page a few times?

• Digital Assets aren’t showing up in search:
  • Has the asset been activated in the DAM folder?
  • Is the activation request still pending (queued)?

• My website isn’t showing up in search:
  • Have page descriptions and titles been set up properly?
Questions?

Reach out to us for help.

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