Introduction to the CMS

Communiqué (CQ5)
Adobe Experience Manager (AEM)

Web Strategy and Operations

July 2017

Table of Contents

Introduction

In this workshop, you'll learn how to use Adobe Experience Manager (AEM) to create, edit, and publish content to www.acs.org. It's designed to help new content authors get familiar with the application and perform the most common tasks. Refer to the online user's guide for more detailed information on how to use advanced features.

What is a CMS, and why are there so many acronyms?

A Web Content Management System (WCMS or CMS) is a web application for managing and publishing large websites. When ACS originally purchased the CMS, it was called Day Communiqué (CQ5). Adobe recently bought the application and is changing the name to Adobe Experience Manager (AEM). This workshop uses the generic acronym CMS, but you may hear your colleagues say CQ5 or AEM when making requests.

CMS Websites

CMS Help: www.acs.org/webhelp
This website includes the CMS User's Guide and information on web topics like email, analytics, SEO, and more.

CMS Training: www.acs.org/cmstraining
A mock version of the CMS where you can learn and practice editing web content.

CMS: www.acs.org/cms
The live CMS for editing content on the acs.org website.
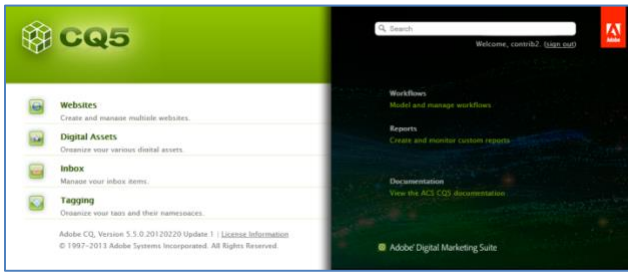
Operating Systems

- Windows
- Mac

Browsers

- Firefox (Recommended)
- Chrome

Login & Password

- Contact your CMS Reviewer to activate your account.
- Use your LDAP username and password to log in.

CMS Interface

CMS Welcome Page

Websites (Website Admin):
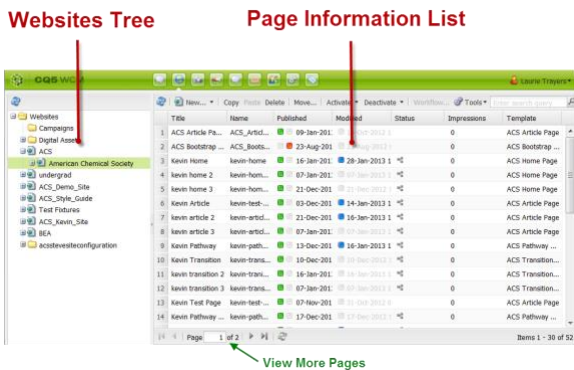Edit and organize web pages. In the CMS, the term page means web page.

Digital Assets (DAM Admin):
Store documents (PDF, PPT, etc.) and images.

Inbox:
Manage workflow requests.

Websites Admin

Information Architecture (IA)

The ACS website is organized into a hierarchy of related topics, not by the ACS organization chart. You may share web pages and site sections with other departments.

Websites Tree

- List of websites and web pages.
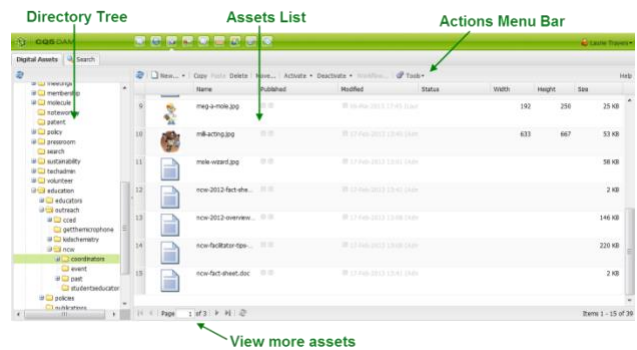- Use the **plus icon (+)** to expand or the **minus icon (-)** to collapse sections.

Parent Pages and Child Pages

- **Parent pages** have **plus icons (+)** next to them.
- Use the **plus icon (+)** to see related **child pages**.

Page Information List

- **Open web pages:**
  Double-click on a page title.
- **View page options:**
  Right-click on a page title.

DAM Admin

- Store images and documents, like PDFs, Word Documents, and PowerPoint.
- **Do not upload audio or video files into the DAM!** Use YouTube, Vimeo, SoundCloud, or AudioVideoWeb.
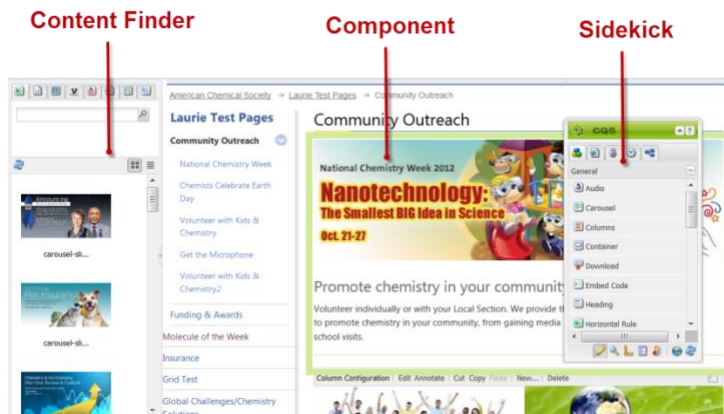
CMS Global Navigation

Finding acs.org Web Pages and DAM Assets

Websites Tree: Use the **ACS** tree.
DAM: Use the **acsorg** tree.

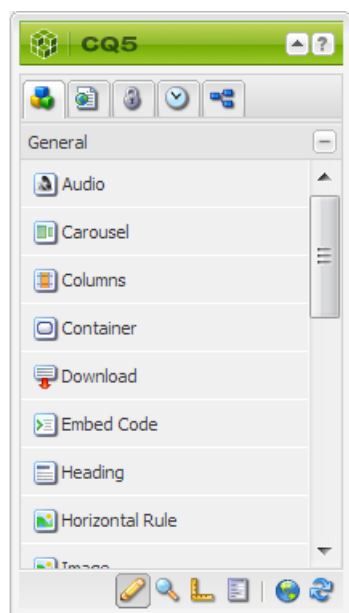**Important!** Do not use the Digital Assets tree in the Websites Admin!

Content Page

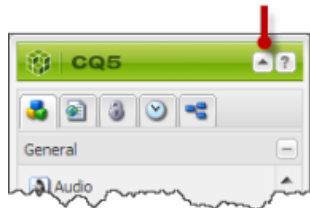**Content Finder:** Search for images and documents in the DAM Admin.

Components: Boxes that allow you to add and arrange content on a web page, like text, images, video, etc.

Sidekick: Tools to edit web content, enter metadata, start a workflow, and take other actions on a webpage.
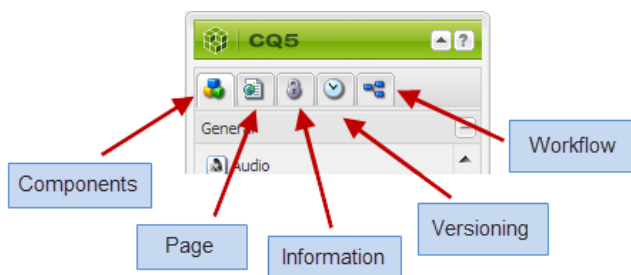
Sidekick

Sidekick Tabs

Components: Add content, like images, text, and video.

Page: Access page properties, lock a page, or view references.

Information: View who has modified or published a webpage.

Versioning: Create and restore page versions. The CMS creates versions automatically when a page is published. All versions are deleted after 90 days.

Workflow: All content is required to go through workflow before it is published to the website.

1. Contributor → 2. CMS Reviewer → 3. WSO → Published

Content submitted into workflow is approved, rejected, or canceled.
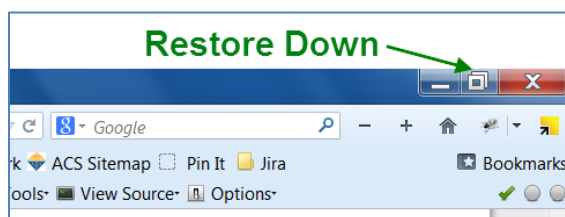
Sidekick Modes

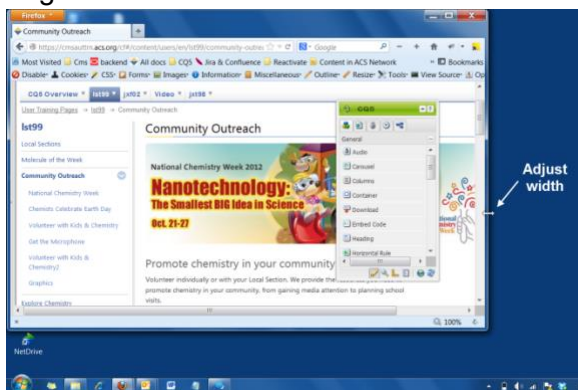# Mobile Web & Accessibility

Mobile Web

Webpages will look different when viewed on a tablet or smartphone.

Test Pages for Mobile Devices

1. Use the **Restore Down** button to release the browser window from full-screen view.

2. Adjust the width of the web browser by clicking and dragging the window's right edge.

3. Make the window narrow to trigger the tablet and smartphone layouts.

Accessibility

Make web pages accessible to users with disabilities.

- Vision
- Hearing
- Motor skills (Movement)
- Cognitive

Other Benefits

- Future-proof your content. Accessible content is more likely to be comparable with future technologies.
- Improve SEO Performance. Search Engines and Search Engine Optimization (SEO) use any of the same techniques to find keywords.
- Better User Experience (UX). Accessible design is more user-friendly and benefits all users, not just people with disabilities.

What Needs to be Accessible?

Web content includes web pages, PDFs, Word documents, infographics, videos, MP3s, interactive games, etc. Anything you want to be on the website should be accessible.

What Makes Web Content Accessible?

There is a lot that goes into making a web page accessible. Developers have coded many accessibility features into the CMS. Using the CMS as designed will make your content more accessible. However, there are some additional steps content authors need to do:

- Write descriptive text alt text for images.
- Include captions in videos.
- Organize web page content with headings and sub-headings.
- Apply text styles and formatting correctly.
- Arrange simple, clean layouts that include extra white space around content.
- Write descriptive page titles and headings.
- Write descriptive links; don't use "click here."

Using Components

Components are content building blocks; use them to add and arrange content on your webpage. Each component contains a specific content type, like text, images, and video.
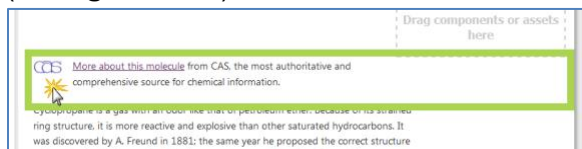
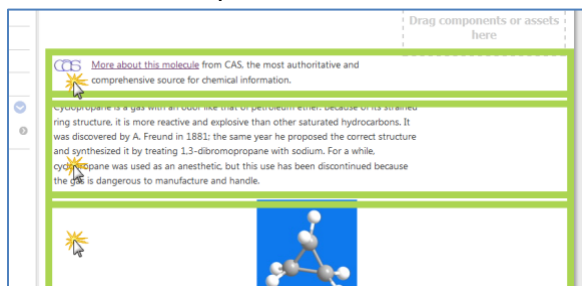## Highlight Components

Hover over a component. (**light green** box)
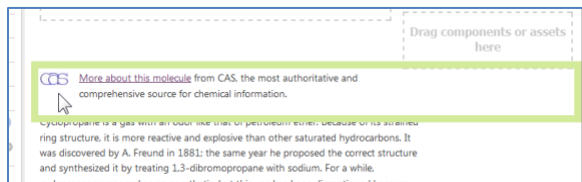
Select Components

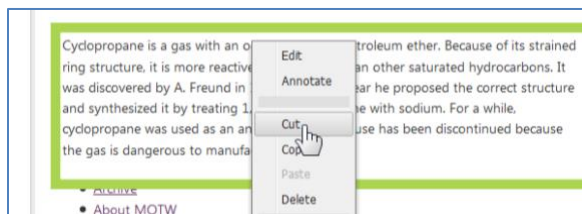Click once to select the component. (**dark green** box)

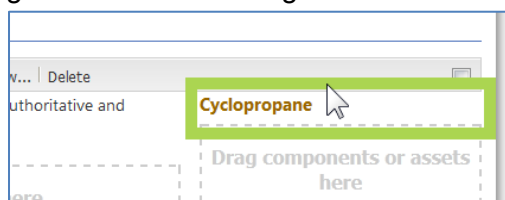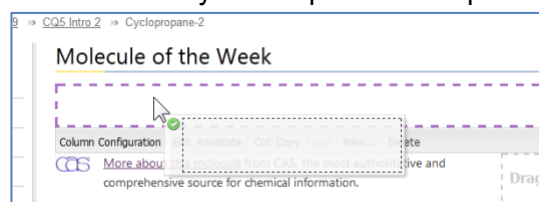**Multiple Select:** Hold the **SHIFT** key, then select each component.

Move Components

Select a component. Then, select the dark green border and drag it to the new location.
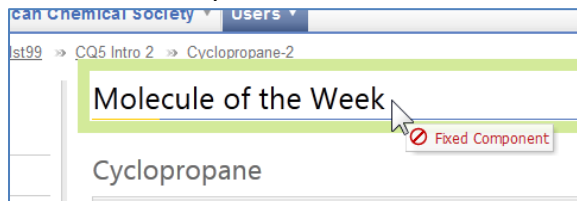

Purple Bounding boxes:
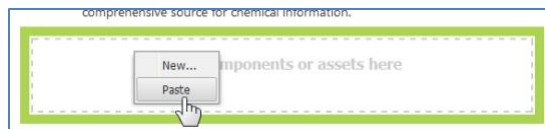
Indicates where you can place a component.

Fixed Components:

Indicates a component that can't be moved.

Cut and Copy

Right-click on a component and choose **Copy** or **Cut** from the menu.

Paste

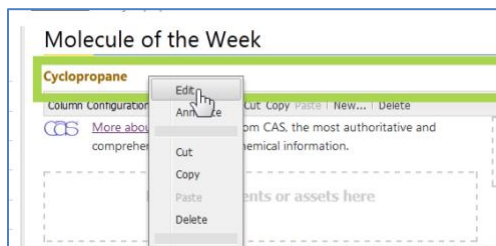Select a component, then right-click and choose **Paste** from the menu.

The content is pasted above the selected component.
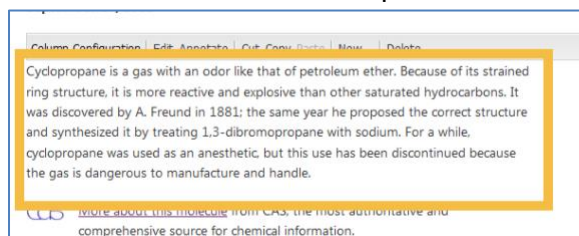
Edit Components

Double-click on a component to edit it.

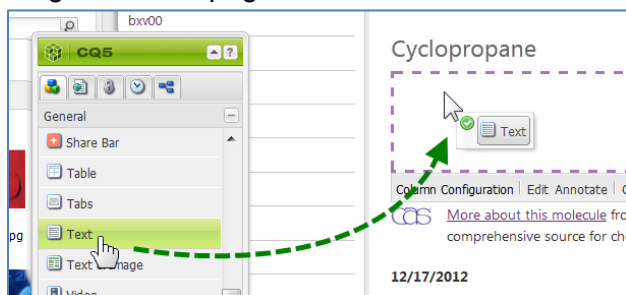Or right-click on a component and choose **Edit** from the menu.

Inline Editing

Select the component, then click on it again. When the box turns orange, you can edit the text. Not available on all components.
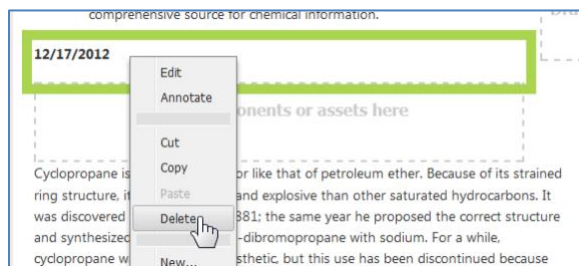

Add Components

Select a component from the **Sidekick** and drag it onto the page.

Delete Components

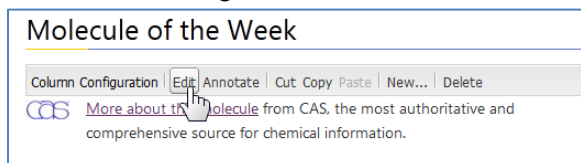Select a component, then right-click and choose **Delete** from the menu.
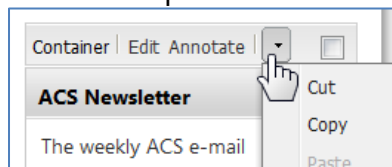

Dynamic List Components

Components containing lists generated by metadata and tags have a gray edit bar.
Note! These components may cause the webpage to refresh while you are editing it.
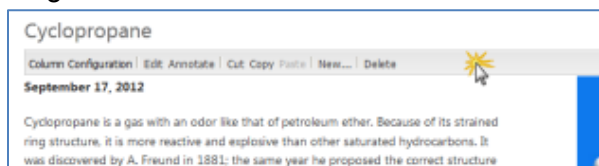
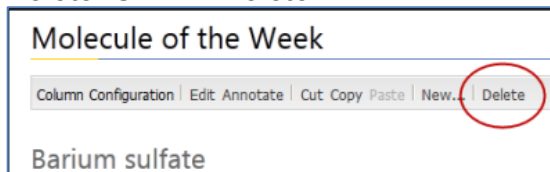**Add Metadata Tags:** Select the **Edit** button to add metadata tags.

View More Options: Select the **down arrow** to view more options.

Move the Component: Select the **edit bar** and drag it to its new location.

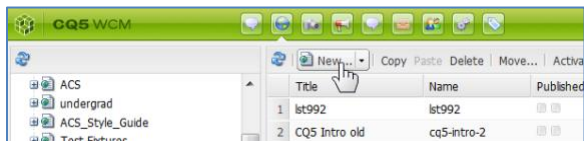**Delete:** Use the **Delete** button.

Add or Delete a Web Page

Add a Webpage

All users can add new web pages as needed.

1. In the **Websites Admin,** select a parent page. The new page will be a child of this parent.
2. Select the **New** Button.

3. In the **Create Page** window, fill in the following fields:
   - **Title** (Default Title):
     Make the title short and descriptive. It appears in the Websites Tree.
   - **Name:**
     A shorter version of the title. It is the file name and appears in the URL.
     - All lowercase.
     - No spaces. Use dashes instead.
     - No special Characters.
   - **Template:** Choose the Basic Template. Only use the other templates when instructed by WSO or your CMS Reviewer.

Delete a Web Page

Email a request to your CMS Reviewer or updates@acs.org.

Move a Web Page

Email a request to your CMS Reviewer or updates@acs.org.

Copy & Paste a Web Page

1. In the **Sidekick**, open the **Pages** tab and select **Copy**. You can only copy/paste individual pages.
2. Choose a location for the page and give the page a new name.
3. After you copy the webpage, go to the **Page Properties** of the **new page** and change the **Title**. Remove the word "copy" from the title.

Transition Templates: Only CMS developers can copy and paste a webpage created with a Transition template.

Email updates@acs.org and request to switch the template from a Transition to a Basic.

Rename a Web Page

Renaming a web page changes the page file name and URL.

Email a request to your CMS Reviewer or updates@acs.org.

Template Settings

To adjust template settings, go to the **Page Properties,** open the **Advanced Tab,** and expand the **Layout and Design** section.

- **Article Layout:** Four pre-defined layouts are available. You can customize these layouts with the **Column Component.**
- **Allow Full Width:** By default, all text will only span 3/4th of the page width. Tick this box to force text to fill the entire width of the page.
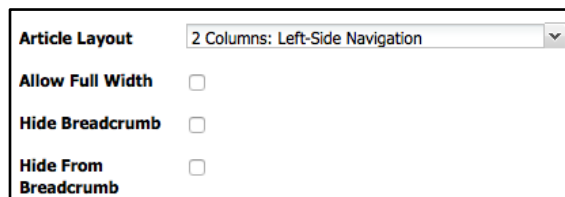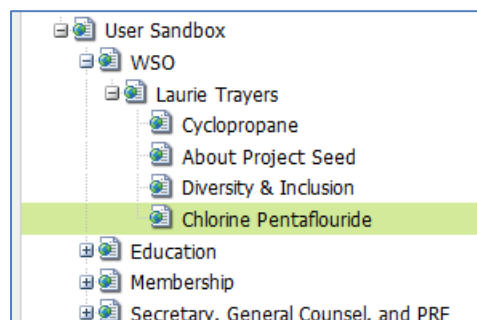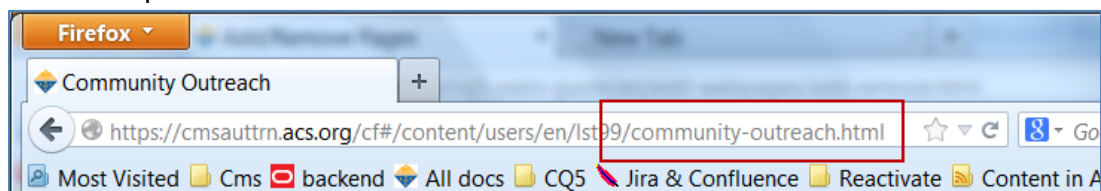
Titles, Headings, and Names

Title

- The default Title is listed in the Websites Tree.
- Used as the default name, title, or label in other areas of the CMS, including:
  - Left Navigation
  - Social Media
  - Title
  - Dynamic Lists
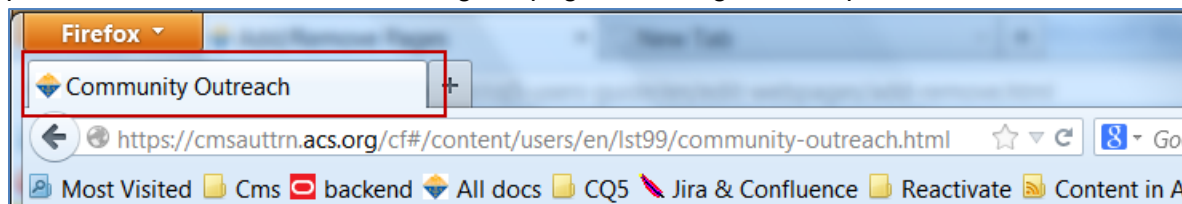 - Heading 1

Name

The file or path name in the URL.

Page Title

The title is the official HTML Metadata title. It appears in the browser Title bar and Tab. Social media platforms use this title when sharing the page. If no Page Title is provided, the default Title is used.

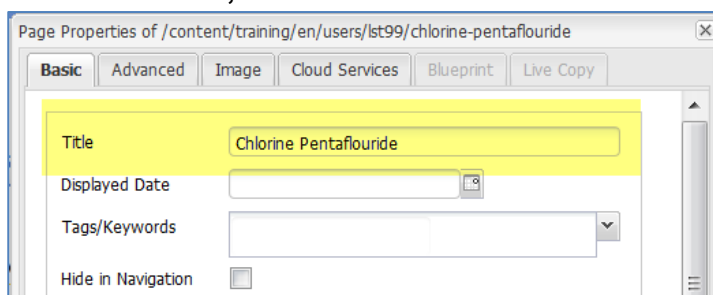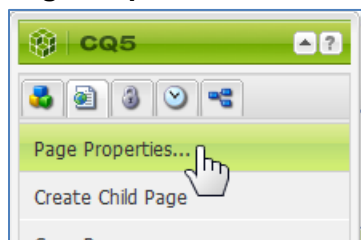## Heading 1 (Title Component):

Every webpage automatically includes a Heading 1 (Title Component). The default Heading 1 is the same as the Title.
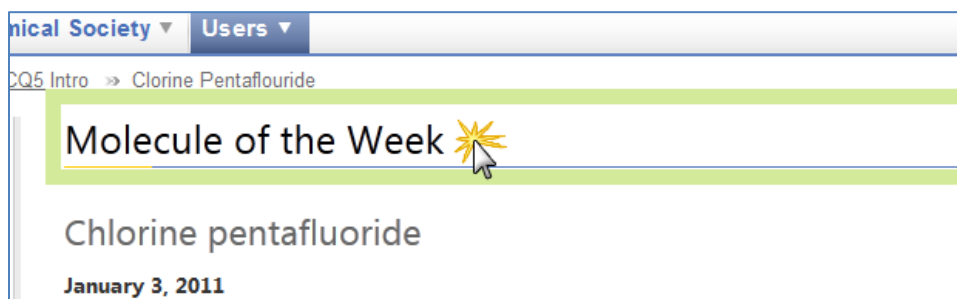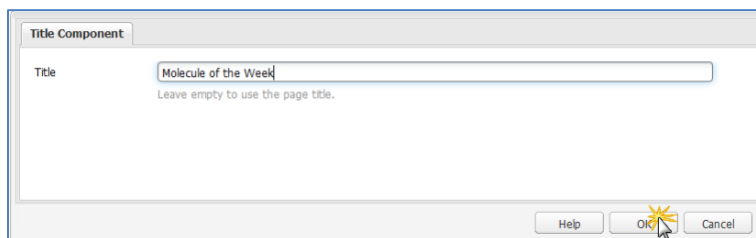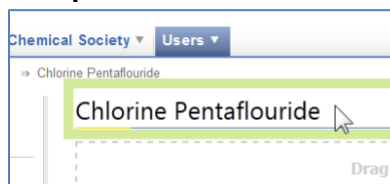
Change Titles and Names

Change the Title (Default Title)

1. In the **Sidekick**, open the **Pages Tab** (second tab). Then, select the **Page Properties.**

2. In the **Basic Tab,** the **Title** field is the default title.
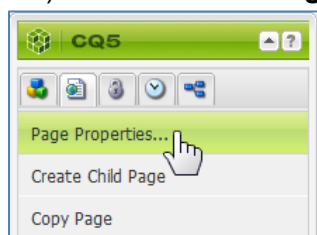
Change the Heading 1 (Title Component)

1. Double-click on the **Title Component** to edit it.

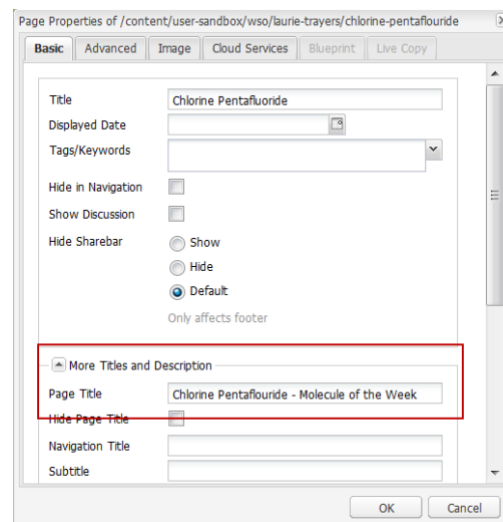2. Enter a new **Title** or leave the field blank to use the default title.

Change the Page Title

1. In the **Sidekick**, open the **Pages Tab** (second tab). Then select the **Page Properties.**
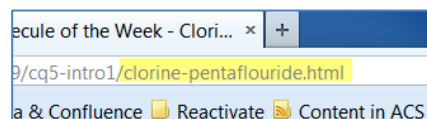
2. In the **Basic Tab,** expand the **More Titles and Descriptions** section.

3. In the **Page Title** field, enter a new title.
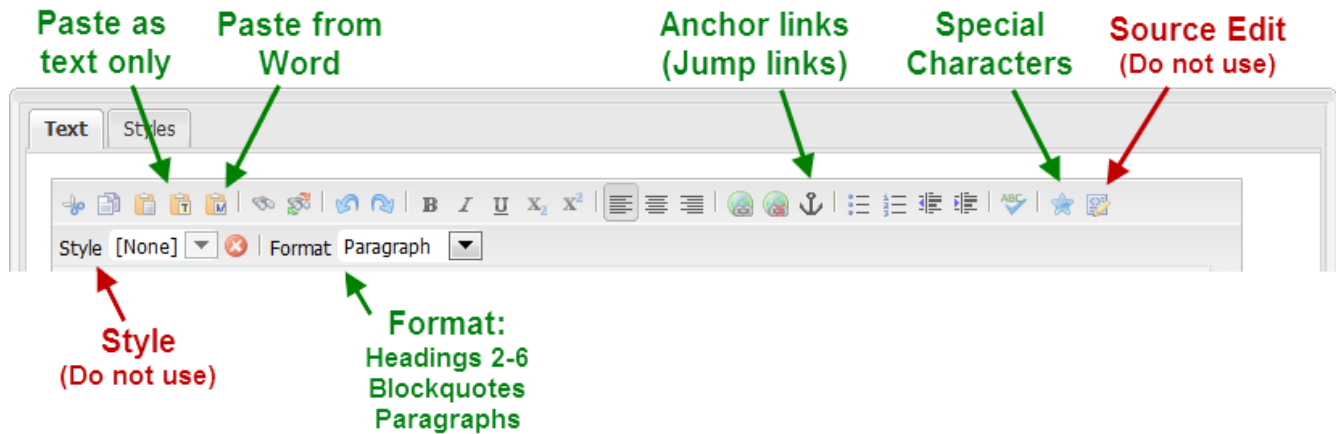
Change the Name (File Name)

Send a request to your CMS Reviewer.
Note! Changing a URL can impact search engine results and analytics data.

Text Component

Text Component Formatting Bar

Paste as text only / **Paste from Word** / **Anchor links (Jump links)** / **Special Characters** / **Source Edit (Do not use)** / **Style (Do not use)** / **Format: Headings 2-6 Blockquotes Paragraphs**

Copy Paste
- **CTRL + V:** Works for most copy and paste actions.
- **Paste as text Only:** (Recommended) You may need to reformat all content after pasting.
- **Paste from Word:** Use to copy and paste from Word Documents.

Copy and Paste Tips
- **HTML Formatting:** Webpages use HTML code to format text.
  - HTML has minimal formatting options, such as bold, italic, and links.
  - The CMS will remove some of the formatting when you paste the text.
- **Numbered and Bulleted Lists:** Sometimes, the formatting is changed. You may have to reformat lists after pasting them.
- **Check links:** Copying and pasting can change the URL. Verify all links after pasting them.

Source Edit
Use it to fix minor code errors, not to write code! You can only use basic HTML tags. Do not use tag attributes, CSS, or scripts.

Headings
- **Heading Component:** For headings that span the entire width of the page.
- **Text Component:** Select a heading level from the Format dropdown box.

Lists

- Use the indent buttons to create sub-lusts.
- You can combine bulleted and numbered lists.
- Limit sub-lists to two levels deep, maximum. **Limit sub-lists to two levels deep, maximum.**
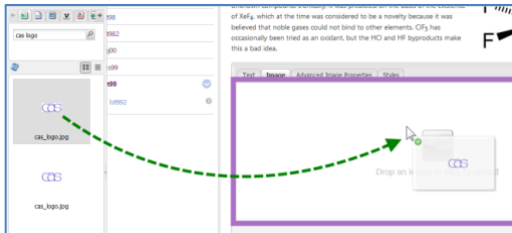
Images

Add an Image

You can add images to the **Image Component** or the **Text and Image Component.** There are two ways to upload an image.

Upload images to a component: Upload images into the component when you only plan to use the image on one page.
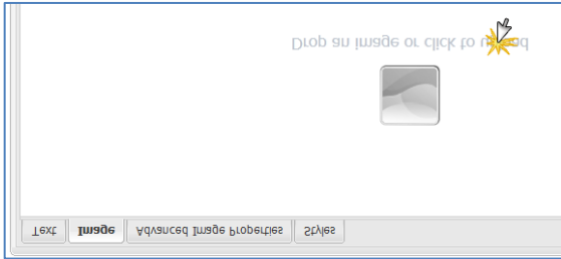
Upload images to the DAM: Upload images to the DAM when you plan to use the image on multiple pages.

- When you update an image in the DAM, all web pages that use the image will also update.
- You can select images in the Content Finder and drag them into components.

Image Properties

The **Image Component** and the **Text and Image** Component have an **Advance Image Properties** tab. The most used properties are:

- **Alt text:** Needed for accessibility. Add a brief description of the image. (A few words or a phrase.)
- **Link to:** Make the image a hyperlink. (Linked images must have alt text).
- **Image caption/credit:** Set an image width to restrain the width of a caption or credit.
- **Image Size:** Set a custom width and height. If you only set one dimension, the other will scale proportionately.

Image Tab

The **Image Component** and the **Text and Image** Component have an **Image** tab for cropping and rotating the image. Use Clear to remove the image.

- **Replace an image:** Use Clear to remove the image.
- **Image Map:** Do not use the Image Map feature.

Image Requirements

Crop and resize images before you upload them.

- Maximum image width: 1000 px.
- File Format: JPG, PNG, GIF (No animated GIF files).

Downloadable Images

You can store high-resolution images in the DAM when providing files for news, marketing, or education.
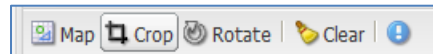
Image Compression

JPG Files:

- The CMS automatically compresses JPG files.
- Uploading high-quality JPGs will prevent blur; 1 MB maximum.

PNG and GIF Files:

- The CMS does not compress PNG or GIF image files.
- Set the resolution to 72 dpi or 96 dpi.
- Reduce the file size as small as possible; a maximum of 50 KB is ideal.
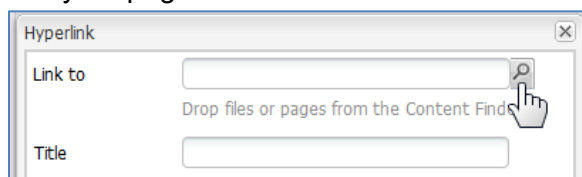
Links

Never copy and paste URLs from the live acs.org website. The CMS can't track them when you move, rename, or delete pages. WSO doesn't assist in fixing broken links caused by incorrect formatting.

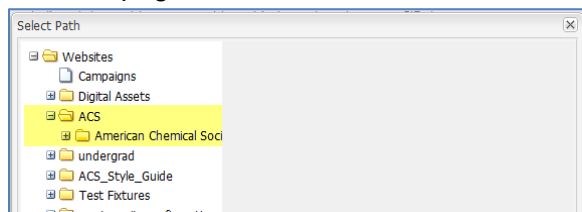## Link to a page in the CMS

1. Select the link text and then the **Hyperlink** button in the edit bar.
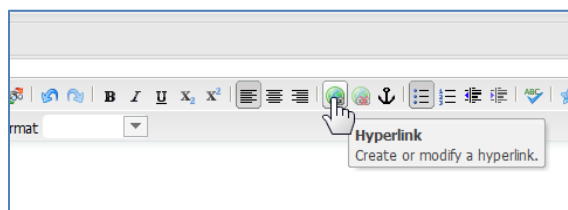
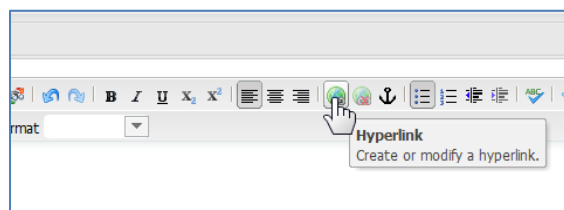2. In the **Link to** field, use the **Search Box** to find your page.
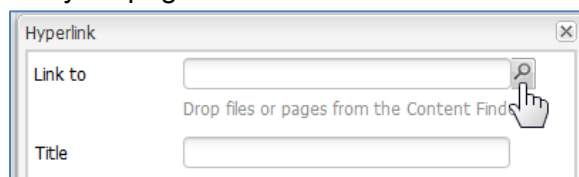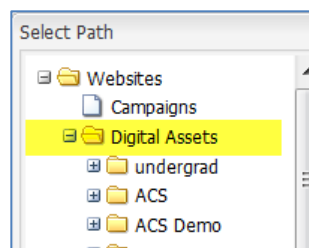

3. Select a page in the **Websites Tree.**

   Note! Folder icons in the **Websites Tree** represent web pages except for the Digital Assets folder.

Link to a document in the DAM

1. Select the link text and then the **Hyperlink** button in the edit bar.

2. In the **Link to** field, use the **Search Box** to find your page.

3. Open the **Digital Assets** folder and find the document in the tree.


Other Link Settings

- **Title:** In some browsers, the title will appear as a "tooltip."
- **Open in New Window:** Use sparingly; too many open windows can confuse users.
- **Link goes to protected content:** Add a security icon to inform users that the link points to members-only content.
 **Important!** This does not mean your content is secure! It is just the icon.
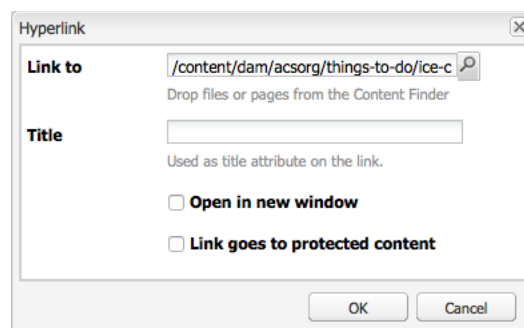
mailto: Links

1. Select the email address and then the **Hyperlink** button in the edit bar.
2. In the **Link to** the field, type "mailto:" followed by the email address. Example: mailto:motw@acs.org
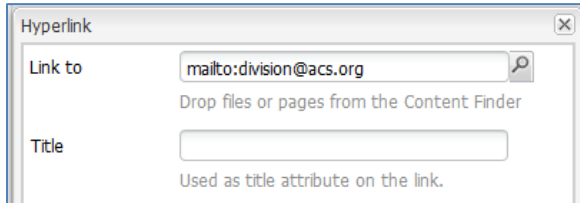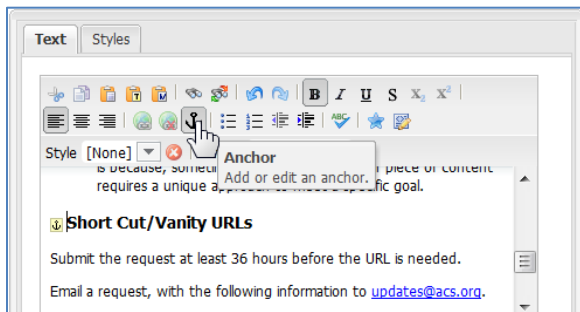
Link to an External Website

1. Select the link text and then the **Hyperlink** button in the edit bar.
2. In the **Link to** field, enter the full URL. Include the http://www.
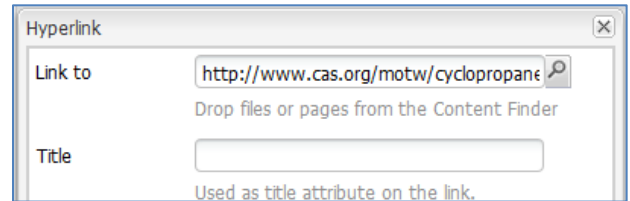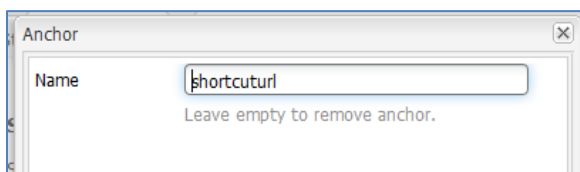
Anchor Links (Jump links)

First: Create a Named Anchor

1. Place the cursor at the beginning of the destination text and then select the **Anchor** button in the edit bar.
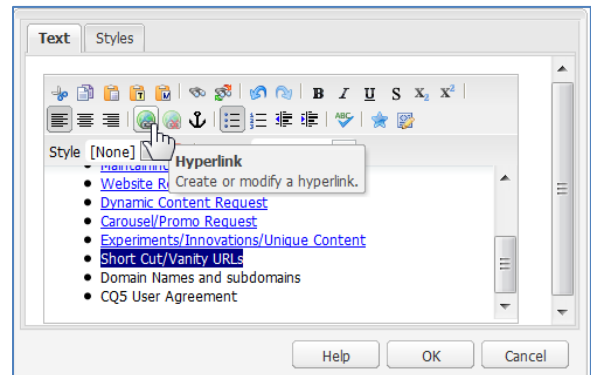
2. Name the anchor. It must be lowercase, with no spaces, and not begin with a number.
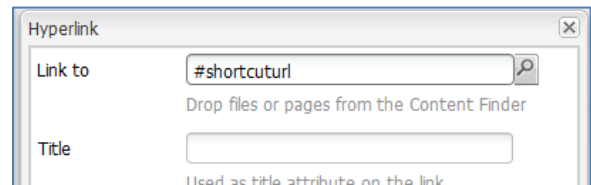
Second: Create the Jump Link

3. Select the link text and then the **Hyperlink** button.

4. Enter a hash mark (#) followed by the anchor **Name**. For example, #introduction

Vanity URLs (Shortcut URLs)

- Send an email to updates@acs.org to request a vanity URL.
- Provide the following information:
    - The Vanity URL.
      Example: www.acs.org/ncw
    - The URL the Vanity URL will point to.

Best Practices:

- Links to vanity URLs can't be tracked for analytics.
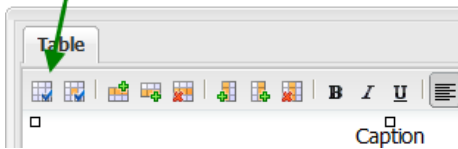- Vanity URLs are for webpages, not documents (PDF, Word, etc.)

Tables

- **Keep Tables simple!** They are easier to maintain.
- Click on the table to activate the table formatting bar.
- Don't use tables to create page layouts. Use **Column Component** instead.

Table Properties

Apply to the entire table.

Width: The recommended table width is 100%. Other width percentages do not work consistently.

Style: Choose a pre-defined color and border design combination. All styles have a table width of 100%.

Caption: A title that identifies a specific table. Each table should have a unique title.

If the Caption disappears, Use a **Heading Component** instead. Place it directly above the table.
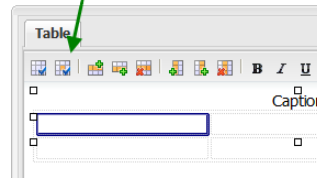
Summary: An accessibility feature for visually impaired users. Briefly explain the purpose of the table. The summary is not displayed on the webpage. Only a screen reader can access it.
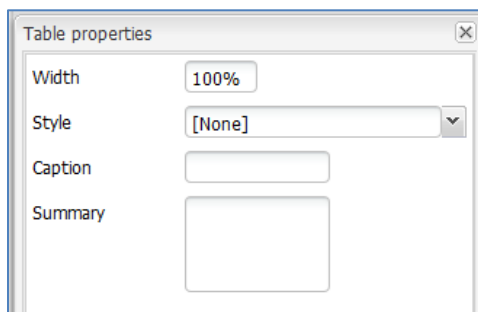
Cell Properties

Apply to a cell, column, or row.

Width (%): Not recommended. Cell width percentages do not work consistently.

Horizontal and Vertical Align: You can combine a horizontal alignment left, right, or center with a vertical alignment top, middle, or bottom.

Cell types
- **Data** – Default type. Use for most cell content.
- **Header** – The entire top row or first column of every table should contain **Header Cell Types**.

Apply to…: For applying consistent formatting to an entire row or column of **Header Cell Types.**
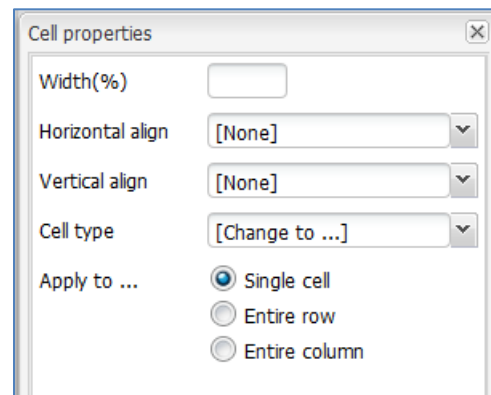
Columns

Column Component helps you arrange and align content in your page layout.

Borders: Add borders to the top, bottom, and inside edges of the column.

Nested Columns: Don't place **Column Components** inside other columns. Nested columns may cause error messages when editing the page.

Keep page layouts simple. Most pages should not have more than two columns.

Accessibility: Columns will cause accessibility problems when not formatted correctly.

Test pages in the mobile web view to help find problems. Content must make sense when read from top to bottom and left to right.

Containers

Use the **Container Component** to highlight content or group-related pieces of content.

Format Container Component Headings

1. Add a **Heading Component** to the container. Place it at the top of the container.
2. Format the heading as a **Heading 2** and choose a **Style Preset.**
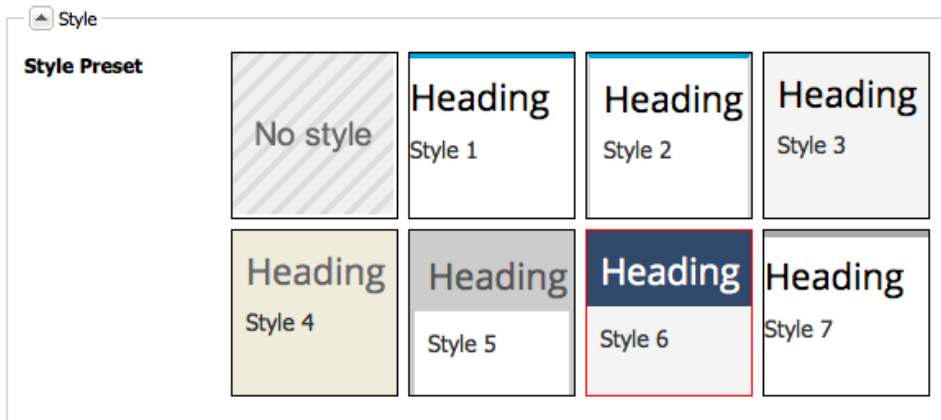
DAM

What are Digital Assets?

Assets is another term used to define files stored in the DAM.

Types of DAM Assets

- **Documents** like PDF, PowerPoint, Word, Excel, InDesign, EPS, PostScript, etc.
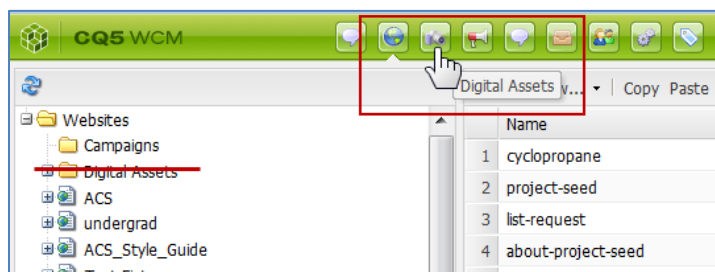- **Images** like JPG, GIF, PNG, TIFF, PDF, etc.

Audio and Video

- **Do not upload audio or video to the DAM!**
- Use YouTube, Vimeo, or Brightcove.

Open the DAM

Select the **Camera button** in the CMS Global Navigation bar.

Note! Don't use the Digital Assets folder in the Websites Tree! This folder does not work the same as the DAM Admin.

DAM Admin

Viewing DAM Assets
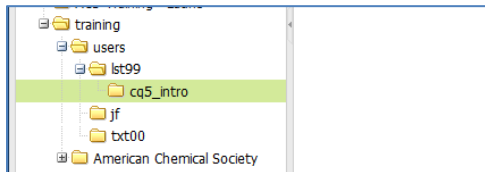

Left Panel: View the asset and asset details.

Metadata: A **Title** and a **Description** is required.
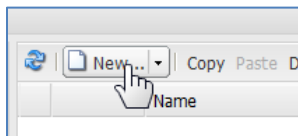
Right Panel Tabs:
- **References:** View all the pages in the CMS that link to this asset.
- The **Renditions** and **Versions** are not used.
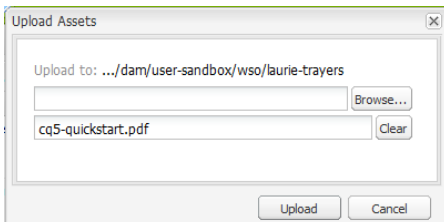
Add an Asset to the DAM

1. Select a folder

2. Select the **New** button in the **DAM Actions menu.**

3. In the **Upload Assets Window**, locate your file on your computer and select the **Upload** button.
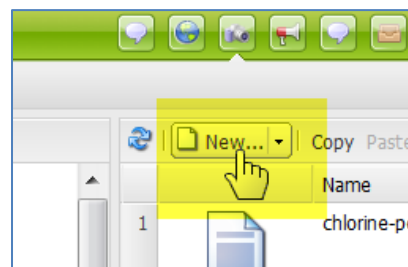

You can upload more than one file at a time.
Use these **File Naming Conventions:**
- All lower case
- No spaces. Use dashes instead.
- No special Characters
- A file extension
  (.jpg, .pdf, .pptx, etc.)
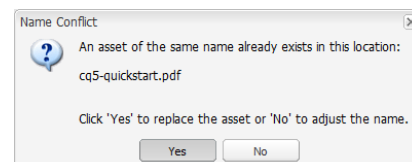
Replace a DAM Asset.

Important! When replacing an existing file in the DAM, the new and existing files must have the same file name.

1. Select the **New** button in the **DAM Actions menu.**

2. In the **Upload Assets Window**, locate your file on your computer and select the **Upload** button.

3. When prompted, choose **Yes** to replace the asset.

Workflow

3-Step Workflow:
Contributor → CMS Reviewer → WSO → Website

Locked Webpages: Unlock web pages before starting a workflow. Locked pages can't be published. WSO and CMS Reviewer can't unlock web pages.

Email: The CMS sends you notification emails for content that is submitted, rejected, published, or canceled.
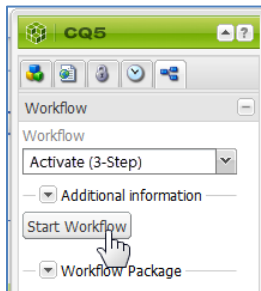
Inbox: You can approve, reject, and cancel content in workflow.

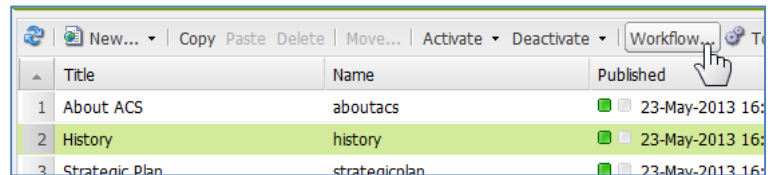## Start A Workflow

1. There are two ways to start a workflow.

   From the Sidekick:
   Open the **Workflow Tab** and select the **Start Workflow** button.

   From the DAM Admin:
   1. Select an asset from the list.
   2. Select the workflow button in the **DAM Actions** menu.

2. Choose a workflow from the dropdown menu.
   - **Activate (3-step):** For Contributors whose content is first approved by their CMS Reviewer.
   - **Activate (2-step):** For Reviewers whose content is approved by WSO.
   - **Reject:** WSO and workflow Reviewers can reject content. Rejections send content back one step in workflow.
   - **Cancel:** Anyone can cancel a workflow if the content is at their step in the workflow.

3. Additional Information (Optional).
   In the Sidekick, expand the **Additional Information** section:

   - **Comment:** These comments will appear in the CMS email sent to the CMS Reviewer.
   - **Workflow Title:** Add a label to identify the content for a specific project. Example: "CCED 2018 Launch."
   - **Scheduled Date:** Set a web page or DAM asset to go live at a specific date and time. The content can be approved early and go live at the scheduled date and time.