

Introduction to the CMS

Communiqué (CQ5)
Adobe Experience Manager (AEM)

Web Strategy and Operations

July 2017

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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

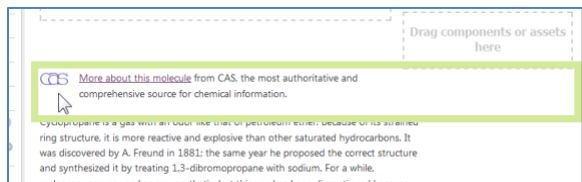
- Contact your CMS Reviewer to activate your account.
- Use your LDAP username and password to log in.

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.

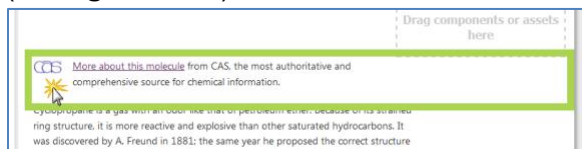
Highlight Components

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

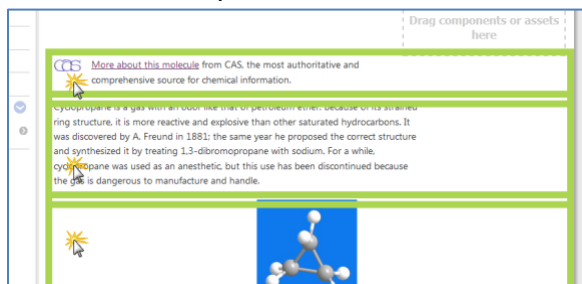


Select Components

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

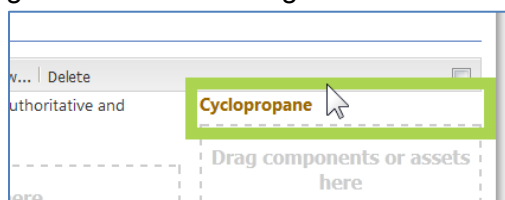


Multiple Select: Hold the **SHIFT** key, then select each component.



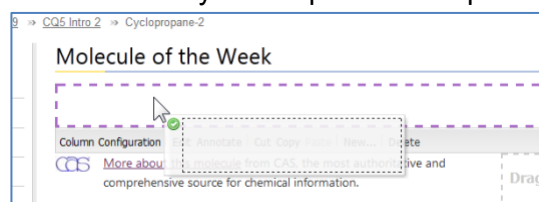
Move Components

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.



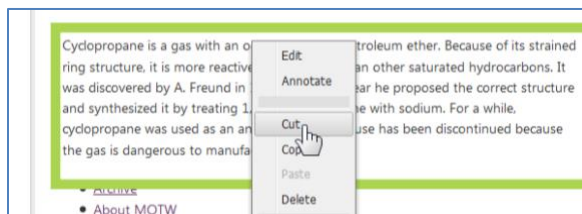
Fixed Components:

Indicates a component that can't be moved.



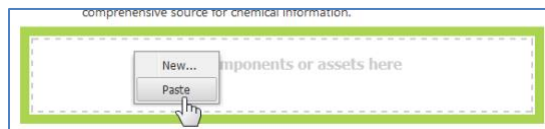
Cut and Copy

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.

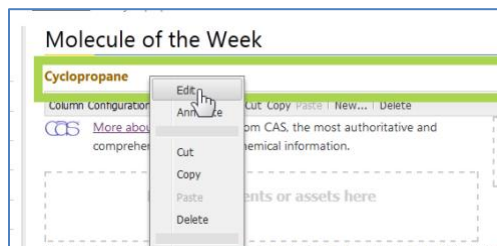


The content is pasted above the selected component.

Edit Components

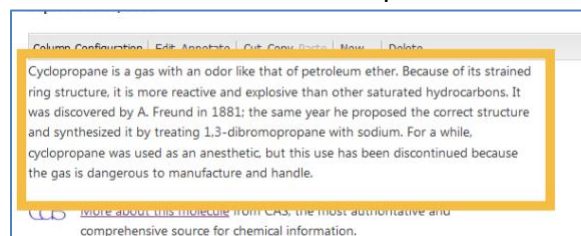
Double-click on a component to edit it.

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



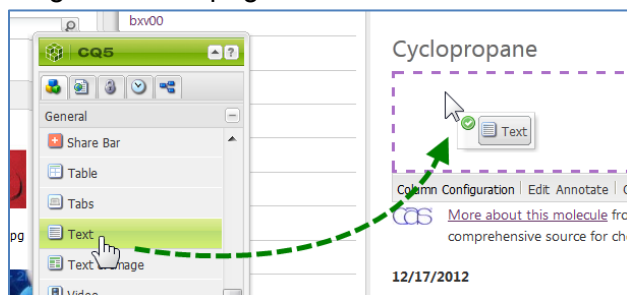
Inline Editing

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



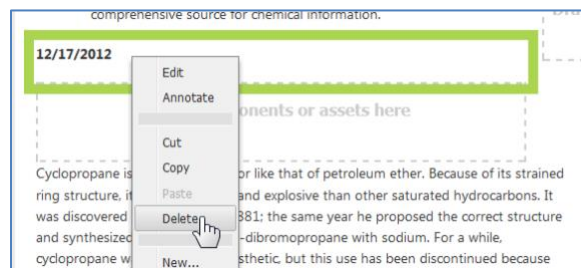
Add Components

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.

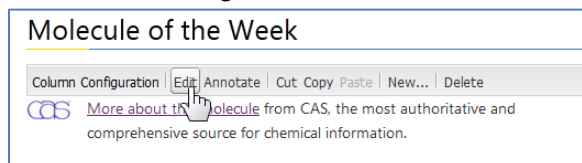


Dynamic List Components

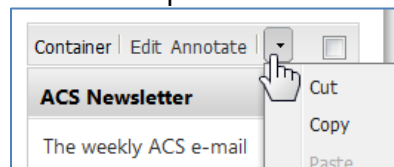
Components containing lists generated by metadata and tags have a gray edit bar.

Note! These components may cause the webpage to refresh while you are editing it.

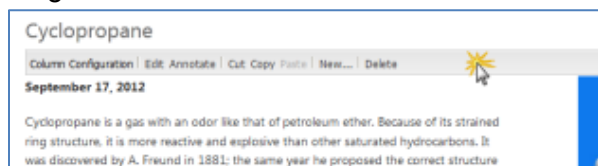
Add Metadata Tags: Select the **Edit** button to add metadata tags.



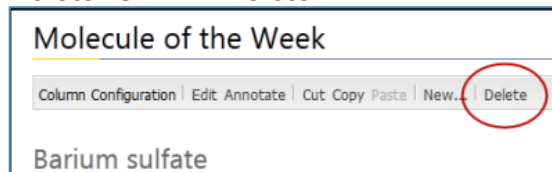
View More Options: Select the **down arrow** to view more options.



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



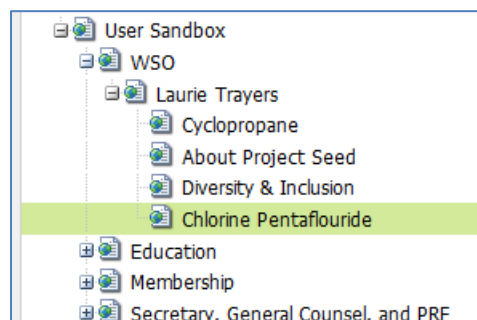
Delete: Use the **Delete** button.



Titles, Headings, and Names

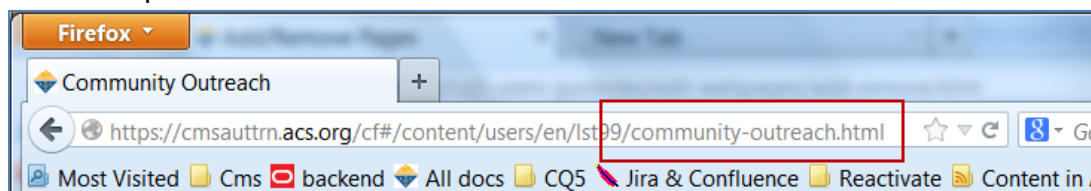
Title

- 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



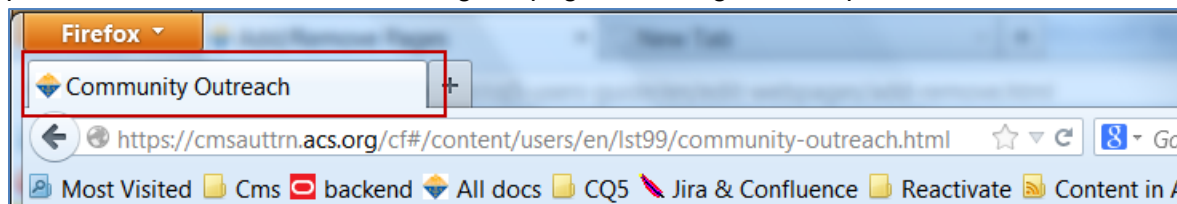
Name

The file or path name in the URL.



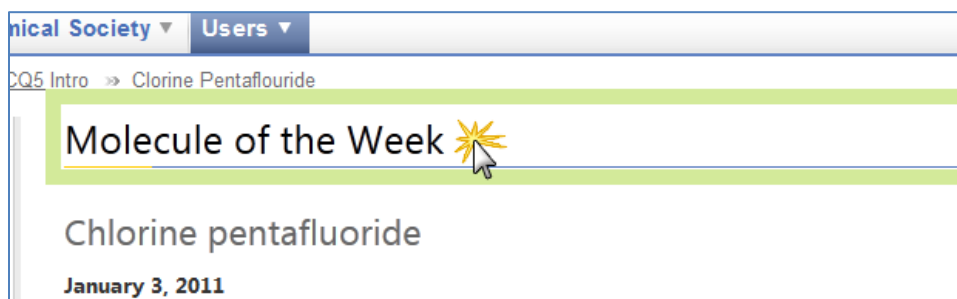
Page Title

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):

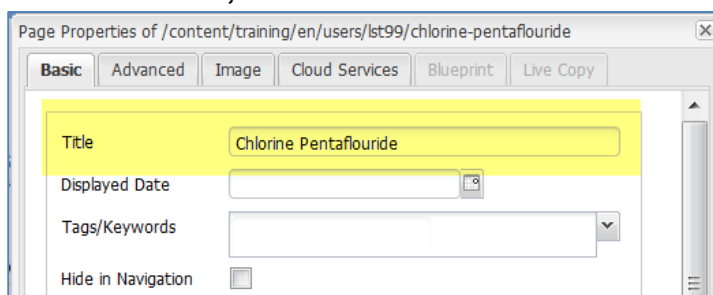
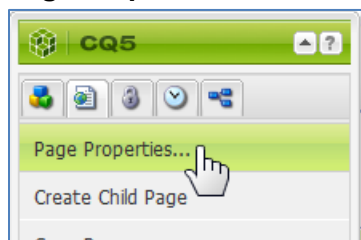
Every webpage automatically includes a Heading 1 (Title Component). The default Heading 1 is the same as the Title.



Change Titles and Names

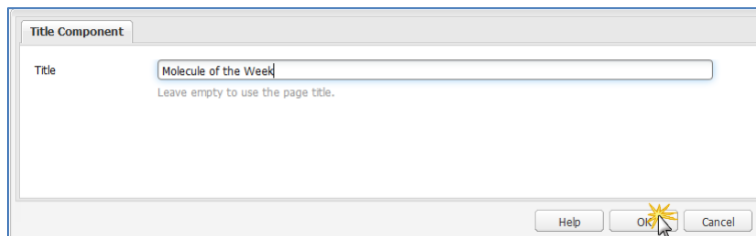
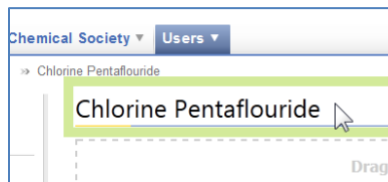
Change the Title (Default Title)

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.



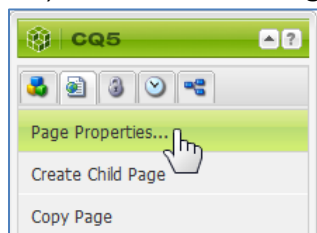
Change the Heading 1 (Title Component)

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.

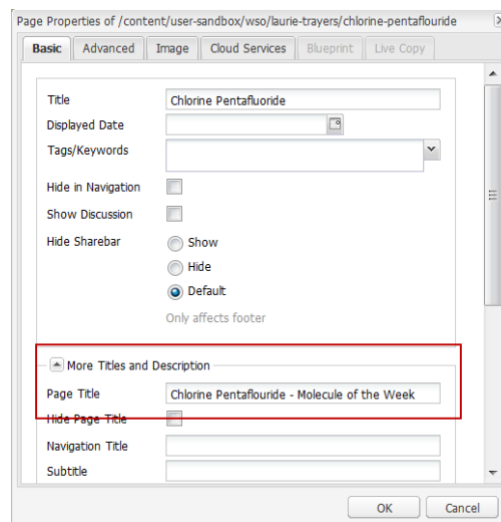


Change the Page Title

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



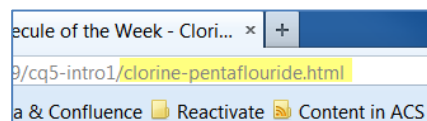
2. In the **Basic Tab**, expand the **More Titles and Descriptions** section.
3. In the **Page Title** field, enter a new title.



Change the Name (File Name)

Send a request to your CMS Reviewer.

Note! Changing a URL can impact search engine results and analytics data.



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.

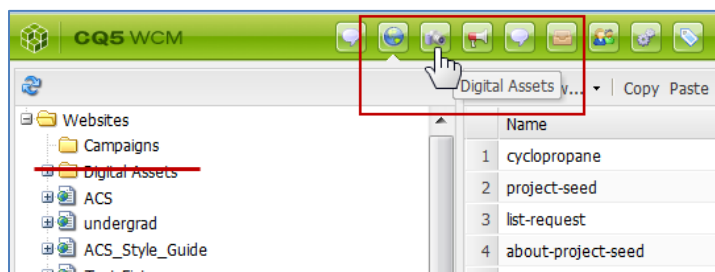
Audio and Video

- **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

Directory Tree **Assets List** **Actions Menu Bar**

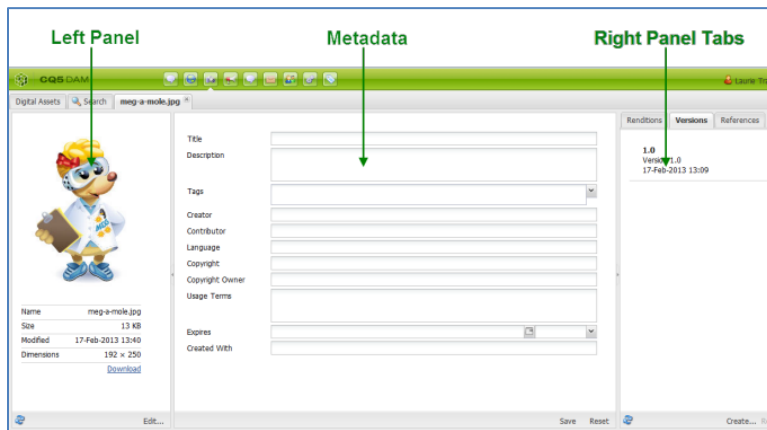
The screenshot displays the Q5 DAM Admin interface. On the left is the 'Directory Tree' showing a hierarchy of folders like 'meetings', 'memberships', 'molecule', etc. The 'coordinators' folder is selected. The main area is the 'Assets List', which is a table with columns: Name, Published, Modified, Status, Width, Height, and Size. It lists several assets, including 'meg-a-mole.jpg', 'mole-wizard.jpg', and 'ncw-2012-overview...'. At the top of the list is an 'Actions Menu Bar' with options like 'New...', 'Copy', 'Paste', 'Delete', 'Move...', 'Activate', 'Deactivate', 'Workflow...', and 'Tools'. At the bottom of the list, there is a 'View more assets' link.

	Name	Published	Modified	Status	Width	Height	Size
9	meg-a-mole.jpg		06-Mar-2013 17:45 (Laur		192	250	25 KB
10	mole-acting.jpg		17-Feb-2013 13:40 (Adn		633	667	53 KB
11	mole-wizard.jpg		17-Feb-2013 13:01 (Adn				58 KB
12	ncw-2012-fact-she...		17-Feb-2013 13:41 (Adn				2 KB
13	ncw-2012-overview...		17-Feb-2013 13:08 (Adn				146 KB
14	ncw-facilitator-tips...		17-Feb-2013 13:08 (Adn				220 KB
15	ncw-fact-sheet.doc		17-Feb-2013 13:41 (Adn				2 KB

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[View more assets](#)

Viewing DAM Assets



Left Panel: View the asset and asset details.

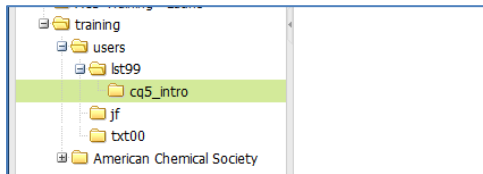
Metadata: A **Title** and a **Description** is required.

Right Panel Tabs:

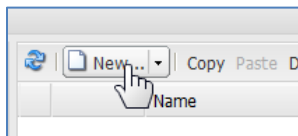
- **References:** View all the pages in the CMS that link to this asset.
- The **Renditions** and **Versions** are not used.

Add an Asset to the DAM

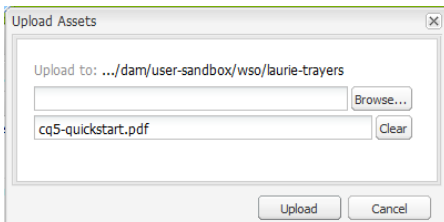
1. Select a folder



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.



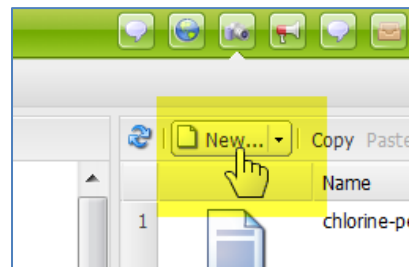
You can upload more than one file at a time.
Use these **File Naming Conventions**:

- All lower case
- No spaces. Use dashes instead.
- No special Characters
- A file extension (.jpg, .pdf, .pptx, etc.)

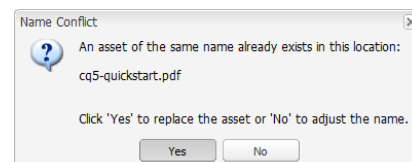
Replace a DAM Asset.

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.

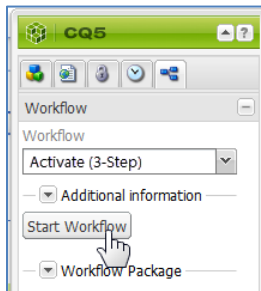
Inbox: You can approve, reject, and cancel content in workflow.

Start A Workflow

1. There are two ways to start a workflow.

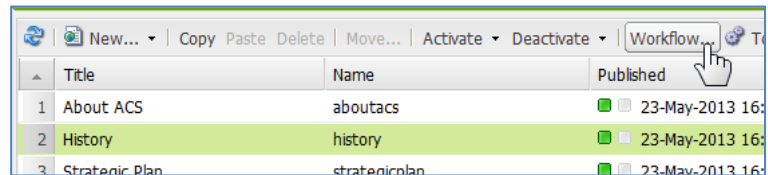
From the Sidekick:

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.

