UNIVERSITY OF SOUTH FLORIDA

CMS User Guide

FOR WEB

- Getting Started
- Developing Great Content
- Template Specs
- Search Engine Optimization

USF

UNIVERSITY OF SOUTH FLORIDA

Contents

Welcome!

We are excited to introduce USF's new content management system—commonly referred to as the USF CMS.

You probably have lots of questions about this great new tool: What is it? What does it do? How does it work? What are the benefits of using it?

This manual will answer many of your questions, and it will provide you with specific guidance that will help you migrate your web content successfully.

Section One: Let's Get Started

It's important for you to have a baseline understanding of what a CMS is and what it can do for you. Here are some answers to the most commonly asked questions.

What is a CMS?

A content management system (CMS) provides website authoring, collaboration, and administration tools designed to allow users with little knowledge of web programming to create and manage website content with relative ease.

What does it do?

A CMS will enable you to build and maintain your unit's website without any advanced technical skills.

What are the benefits of using a CMS?

There are many benefits to using a CMS, including:

Roles and permissions

Your unit's leadership will be able to decide who has access to the CMS, and what role each individual will play. Each unit will be able to assign one or more individuals to the role of content manager (CM), and one or more individuals to the role of content contributor (CC).

Workflow management

Your unit's leadership will also be able to set up a workflow, allowing for web content to be reviewed and approved before the content goes live.

Standardized templates

The CMS includes standardized templates that have been designed to provide consistent branding on all USF websites. All styling is built in and applied automatically to your content, so you don't have to worry about things like fonts, logos and color palettes.

Content repository

The CMS includes a repository of shared content that all USF websites can share. This content will be updated on a regular basis by subject-matter experts, ensuring that every website on campus is featuring the most accurate, up-to-date information and resources. Examples include campus maps, points of pride, facts, statistics, history and much more.

Easily editable content

The CMS makes it easy for you to build a new web page, or edit an existing web page, without any advanced technical skills.

Versioning

The CMS tracks changes to content on all web pages, and allows you to view or revert to old versions when needed.

Scheduling

The CMS allows you to schedule for a page to go live or expire on a pre-specified date, making it easy to publish time-sensitive information even if page content needs to be removed during a time when you are not available, such as during a holiday.

Widgets

The CMS includes custom widgets so you can introduce additional functionality into your web pages. Examples include news feeds, event listings and more.

Responsive design

The CMS templates are "responsive," meaning that your website will display beautifully whether it's viewed on a desktop, a tablet, or a smartphone. There is no need to develop three versions of your site anymore.

Technology upgrades

The CMS will receive regular technology upgrades, so you don't have to worry about whether your technology is up-to-date.

Security and back-up

The CMS has built-in security features, making it less likely that your site could be hacked. In addition, IT will facilitate regular back-ups, so your site will always be able to be restored if problems arise.

ADA compliance

The CMS also has built-in ADA compliance features. An accessibility check is performed prior to each page being published and the system will alert you to any problems that require your attention.

Who is responsible for migrating my unit's website into the CMS?

Every unit is required to identify content manager(s) and content contributor(s) who will be responsible for migrating websites into the CMS.

Your unit's content manager (CM) will be the main point of contact for your unit's website, and will be held accountable for facilitating the migration and maintaining the site after it launches. As such, the CM will be responsible for developing web content, providing training to all users within their unit that will be accessing their CMS site, creating new web pages, editing existing web pages, and reviewing and approving all web pages before they go live. **Students, interns, student assistants and graduate assistants cannot be CMs**.

Like CMs, your unit's content contributors (CCs) will be responsible for developing web content, creating new web pages, and editing existing web pages to which they have permission, but unlike CMs, CCs cannot make content go live without CM approval.

Your unit's leadership will also have the opportunity set up a workflow, allowing for web content to be reviewed and approved before the content goes live. We recommend that leadership keep the workflow as simple as possible. The more complex it gets, the more time it takes to update the site.

To learn who is leading the website migration process on behalf of your unit, view the USF CMS Content Manager List.

If your unit does not have a CM identified, then please contact UCM (ucm@usf.edu).

Is there a deadline for migrating my unit's website?

Deadlines will vary depending on the type of unit and your existing resources. Please contact your unit's CM with questions on the timeline. To learn who is leading the website migration process on behalf of your unit, view the USF CMS Content Manager List.

Who will provide guidance and training?

The USF CMS Workgroup, comprised of employees from Information Technology (IT) and University Communications and Marketing (UCM), has assigned each unit a liaison who will provide initial training, information and other resources. In order to streamline all communication, the liaison will work only with the unit's main CM. All CCs that contact the liaison directly will be directed to their CM where they can be sure that they are receiving the appropriate information for their unit. CMs are responsible for training their CCs and providing training to any new employees within their unit.

I've been asked to serve as my unit's CM or CC. How do I get started?

Your first step is to read the entire CMS User Guide. The guide details every step of the website migration process, from developing and organizing your web content, to selecting appropriate templates, to submitting your content for review, and beyond.

What happens after I read the CMS User Guide?

Your next step is to schedule a meeting with your liaison. During your meeting, you will have an opportunity to ask questions about the process, and to express any concerns you may have. You can also determine how frequently you'll need to meet in the future.

To ensure a successful and productive first meeting, please remember to read the entire CMS User Guide before you meet.

Happy reading!

Section Two: Developing Great Content

Now that you understand what a CMS is and you've learned a bit more about the CMS process, it's time to focus your attention on your most important task: Developing great content for your key audiences, and then putting that content in the right place.

But who are your key audiences? How do you develop great content for them? And how do you organize content so they can find it? The following guidance should help you.

Different Audiences, Different Content, Different Homes

Website

Purpose: to market your unit's offerings to the public

Audience: prospective students and their families, alumni, donors, jobseekers, sports fans, patients, campus visitors, legislators, the media and vendors

Content: information about academic programs, admissions requirements, financial aid, housing, dining, parking, visiting campus and much more

Portal Site

Purpose: to help university insiders conduct their business

Audience: current students and university employees (i.e. anyone with a NetID)

Content: access to enterprise business systems, forms, documents, HR notices and much more

Instructional Content Server

Purpose: to aid faculty in providing quality online acadmic instruction

Audience: faculty and current students

Content: online course content

Applications Server

Purpose: to provide additional functionality to websites and portal sites

Audience: varies

Content: applications (online forms and the databases that support them)

As this diagram shows, USF serves many different audiences, and each of these audiences has distinct needs. Your challenge is to identify your unit's audiences, understand what they need from you, develop content that meets those needs, and post that content in the right place.

Once you identify your audiences and determine what type of content they need from you, it's easy to determine where that content should be housed. For example:

Content for External Audiences Belongs on Your Website

Your website is a tool that helps you market your unit's offerings to the public–also known as your external audiences.

External audiences include all website visitors who do NOT have a USF NetID, including prospective students and their families, alumni, donors, jobseekers, sports fans, patients, campus visitors, legislators, the media and vendors, to name a few.

Content for external audiences includes academic program information, admissions requirements and processes, financial aid and scholarship information, maps, directions, parking information, job postings and much more.

You should plan to migrate this type of content into the CMS so that it displays on your website, which is designed specifically to feature content for external audiences.

Content for Internal Audiences Belongs on Your Portal Site

In contrast, your portal site is a tool that helps you serve the needs of university insiders–also known as your internal audiences. The purpose of your portal site is to help these insiders conduct their university business.

Internal audiences include only those individuals who have a USF NetID. This group is strictly limited to current students and university employees, such as faculty and staff.

Content for internal audiences includes access to university business systems (GEMS, OASIS, etc.), internal announcements, HR forms and more. This information is password protected and is not available to the general public.

You should plan to migrate this type of content into your portal site, which is designed specifically to feature content for internal audiences. A portal site is different from a team site. A team site is a collaboration tool for teams working on a specific project. In contrast, a portal site is an intranet site meant to serve internal audiences.

Note: you may migrate your internal content to the USF CMS until the portal is live. IT Web Services will work with you directly to move internal content to the portal once it is available.

Instructional Content and Applications Do Not Live in the CMS

In addition to the content that lives on websites for external audiences, and content that lives in the portal for internal audiences, all instructional technology will live on a separate server dedicated to housing these modules.

Finally, applications, such as online forms and the databases that are behind them, will live in a separate space as well and will not migrate to the USF CMS.

Audience Identification + Needs Analysis = Personas

Okay—so different audiences have different needs. Got it. But what is the best way to identify your unit's audiences? And how do you determine what they need from you?

One of the most popular ways to identify your audiences and to determine audience needs is to create personas. It's simple: Just think about who your unit serves.

For example, do you serve prospective students? If so, are they undergraduate? Graduate? International? Are they high achievers? First generation? In-state? Out-of-state? Keep asking yourself questions until you get a really clear picture of who you are serving. Once you answer these questions for each of audiences you serve, then create a persona for each one.

Meet Suzie

Name:	**Suzie**
Age:	**18**
Year:	**Incoming Freshman**
Major:	**Biology (Honors College)**
Academic Profile:	**1350 SAT, 4.7 GPA**
Interests:	**Soccer, Student Government**

For example, you might create a persona named Suzie. Suzie is an incoming freshman. She's 18 years old, she's a high achiever who's been admitted to the honors college, and she's moving here from out of state, after visiting USF only once two years ago.

Now think about what Suzie needs from you. Remember, Suzie doesn't know USF. She's never been to college before, and she's only visited campus once. Everything is new to her; she's not familiar with higher ed terminology, much less our university acronyms, so it's important to speak clearly in layman's terms that Suzie understands. And she's not familiar with the campus, so it's important to help her find her way.

What are some things Suzie might hope to find on your website? If you are Parking and Transportation Services, Suzie will hope to find maps, directions, parking information and details about the shuttle bus system. If you are Undergraduate Research, Suzie will hope to find information about how she can get involved in research, including checklists, contact information and more.

If you complete the persona development process for each of your audiences, then you will have a clear understanding of who your audiences are and what each one needs from you. And that will help you to develop great content and to post it in the right place. The bottom line: It's all about Suzie.

What About Existing Content?

So now you understand who your key audiences are, and you know what they need from you. That means you're ready to develop some great new web content. But what about the existing content housed on your current website? What do you do with all that? Do you keep it? Do you throw it away and start over?

This is where a content audit comes in. Simply create a spreadsheet of all the content that is currently on your website. Include all text, photos, videos, PDF docs, RSS feeds, etc.

Say Goodbye to Out-of-Date, Redundant and Bad Content

Now go through the list and strike out any content that is out-of-date, redundant or just plain bad. This might include an event listing from two years ago, content that you've repeated on multiple pages, or poor-quality text and photos.

And Move Applications, Internal and Instructional Content Elsewhere

In addition, you should isolate anything that is still valuable, but simply not appropriate for a website. This might include internal content you want to move into your portal site, or instructional content and applications that live on other servers. Create a separate spreadsheet for each of these types of content and move those items accordingly.

Think You're Done? Not So Fast

If you complete the steps above, you should be left with content that is accurate, up-to-date and appropriate for your external audiences.

But just because you got rid of the worst of it, doesn't mean your content is ready to go. You still have some work to do to ensure that the content you post is working for you, not against you. Remember: If your site is cluttered with random, poor-quality content that doesn't help your audience do what they came to do, then your site doesn't work.

To that end, every word, link, feed, article, photo, video and graphic element on every page of your site should serve a very specific purpose—to help your audience find what they are looking for and complete the tasks they came to complete.

Anything that doesn't serve this purpose should be eliminated. And everything that makes the cut needs to be made "web-friendly."

Preparing Content for Websites

Back in the day, when the web was new, communications people simply copied content out of their latest brochure and pasted it onto their website. Great idea, right? Wrong.

Why? Because site visitors are looking for timely, accurate, accessible information, and they want it FAST. They will not meander around your site like they might do when they are reading a magazine. In fact, studies show that, in a best-case scenario, we only read 28 percent of the text on a web page (Nielsen Norman Group 2008).

Web-Friendly Content

To develop web-friendly content, keep these tips in mind:

- Make sure your content is high quality. Poor quality text, photos and graphics makes your unit seem incompetent and unprofessional, and it harms your credibility.
- Make sure your content is relevant. Don't add content just "to fill the space." Every element on every page must serve a purpose and be relevant to your audience.
- Limit content to one topic per page. If your visitor is on an academics page, then they shouldn't be reading about housing. Content needs to be hyper-focused to help your audience find what they need.
- Keep your text concise. Use short words, short sentences and short paragraphs.
- Lead with the most important details. Follow with supporting details. End with related information.
- Don't use words your audience doesn't understand, including technical jargon, acronyms and the like. Use common words and phrases.
- Use headings and bullet points to break up long blocks of text. This makes it easy for site visitors to scan and quickly find what they are searching for.
- Don't post irrelevant content. External audiences will be annoyed if you clutter up your page with things they don't care about, in the place of things they desperately need.
- Include a call to action. For example, if you want your site visitors to fill out a form, RSVP for an event, or register for orientation, say so.
- Include key words in your text. This will make it easier for search engines to find you. To learn more about Search Engine Optimization, read the SEO section in the addendum of this manual.
- Limit the number of links on each page to a reasonable number.
- Never say "click here." Instead, insert the text link into your copy.
- Link directly to the subject-matter experts. For example, if you need to provide financial aid information, link directly to the financial aid website, as opposed to recreating that content on your own site. This ensures that your visitors will have the most up-to-date information and

removes the need for you to keep tabs of changes outside of your control.

- Follow copyright laws. Do not use photos without permission.
- Do not steal photos from other websites to post on your own, unless you are eager to court a lawsuit.
- Use stock images sparingly, and only with permission / after you've paid for them.
- Make sure photos are high quality. Think web-ready resolution, relevant subject matter and excellent cropping.
- Don't hide text inside images. For example, if you want your unit's name or address to be indexed by a search engine, make sure it is not displayed inside a graphic element.

Now Get Organized

You've identified your key audiences, analyzed their needs, created personas, conducted a content audit, and generated great new content for your website. Now it's time to get organized.

Take a look at the template specifications in the toolbox section of this manual. Notice that there are different types of templates you can use to organize your web content. Not only are these templates properly branded, they are designed to help you provide your audiences with relevant information and resources FAST.

Your site will likely have a homepage that welcomes your site visitors with relevant, accurate, up-to-date content, followed by a series of index pages that help your site visitors quickly access important information and complete necessary tasks. Your site will also likely include text pages that provide detailed yet concise information about specific topics.

Now it's time to determine how to organize your content within the templates. For that, we turn our attention to creating wireframes.

The Importance of Wireframes

Now we have arrived at one of the most critical steps of the entire website migration process: creating wireframes.

Imagine you are building a house. Before you can begin the process of laying the foundation, or putting up walls, or installing cabinets, you need to create a set of blueprints that will tell your contractor not only what goes in your house, but precisely where each element will be placed.

Contractors use blueprints to help them plan and execute the building process. Web managers use wireframes.

Wireframes are like blueprints for your website. They enable you to carefully plan precisely where each and every piece of content will live on your website. Just as a contractor cannot construct a sturdy home without blueprints, web managers cannot create a solid website without wireframes.

The Wireframe Process

The wireframe process can be challenging. To help you, we've broken it down into some basic steps:

1. To begin the wireframe process, download the wireframe forms from the USF Brand website at http://www.usf.edu/ucm/marketing/wireframe-forms.aspx. Note that each wireframe form corresponds to one of the website templates described in this manual.
2. Select the wireframe form that corresponds to the homepage template you'd like to use for your unit's homepage. Using the leadership-approved content you've already developed, fill in the blanks on the homepage wireframe form. Pay close attention to your header navigation, which is extremely important to the following steps.
3. Once you complete your homepage wireframe, take note of the four-to-six links you listed in your header navigation. These links will take website visitors to your secondary pages. Now select the wireframe forms that correspond to the secondary page templates you'd like to use for your unit's secondary pages. Again, using the leadership-approved content you've already developed, fill in the blanks on the secondary page wireframe forms.
4. Once you've completed the wireframe forms for your unit's homepage and four-to-six secondary pages, email these completed forms to your liaison for review. Your liaison will provide feedback that will assure you that you're on the right track.
5. Using feedback from your liaison, repeat the above steps until you've completed a wireframe form for every single page of your unit's website.
6. Share your completed wireframe forms with your unit's leadership to ensure that they are satisfied with the way you've organized the content.
7. Once you secure your leadership's approval, email all your completed wireframe forms to your liaison for final review.

At this point, several things will happen:

1. Your liaison will confirm receipt of your wireframes, and provide you with an estimate of how much time it will take UCM to review your content.
2. Your liaison will ask you to provide information about workflow, including the contact information for each of your unit's content managers and content contributors.
3. IT will use your wireframe forms to set up your directory within the CMS. This will include creating login credentials and permissions for the all the CMs and CCs who will need access to your unit's website; setting up the workflow for content review and approval; creating the basis for your unit's homepage and secondary pages based on your wireframes; and creating your call-to-action buttons, if you have chosen that option. **They will not build out your entire site or add content for you**.
4. While UCM reviews your content and IT sets up your directory, you should carefully review the technical manual found within this user guide.

5. Once your directory is complete, your liaison will assist you with training and you will receive your login credentials. At that point, you will be able to begin building out your website.

Building and Launching Your Website

It's finally time to build your site! If you've done your homework—completing the wireframes and studying your technical manual—this step should go pretty smoothly. Remember: Your liaison is here to help you, so if you get stuck, ask for help (if you are a CC, please contact your CM for assistance).

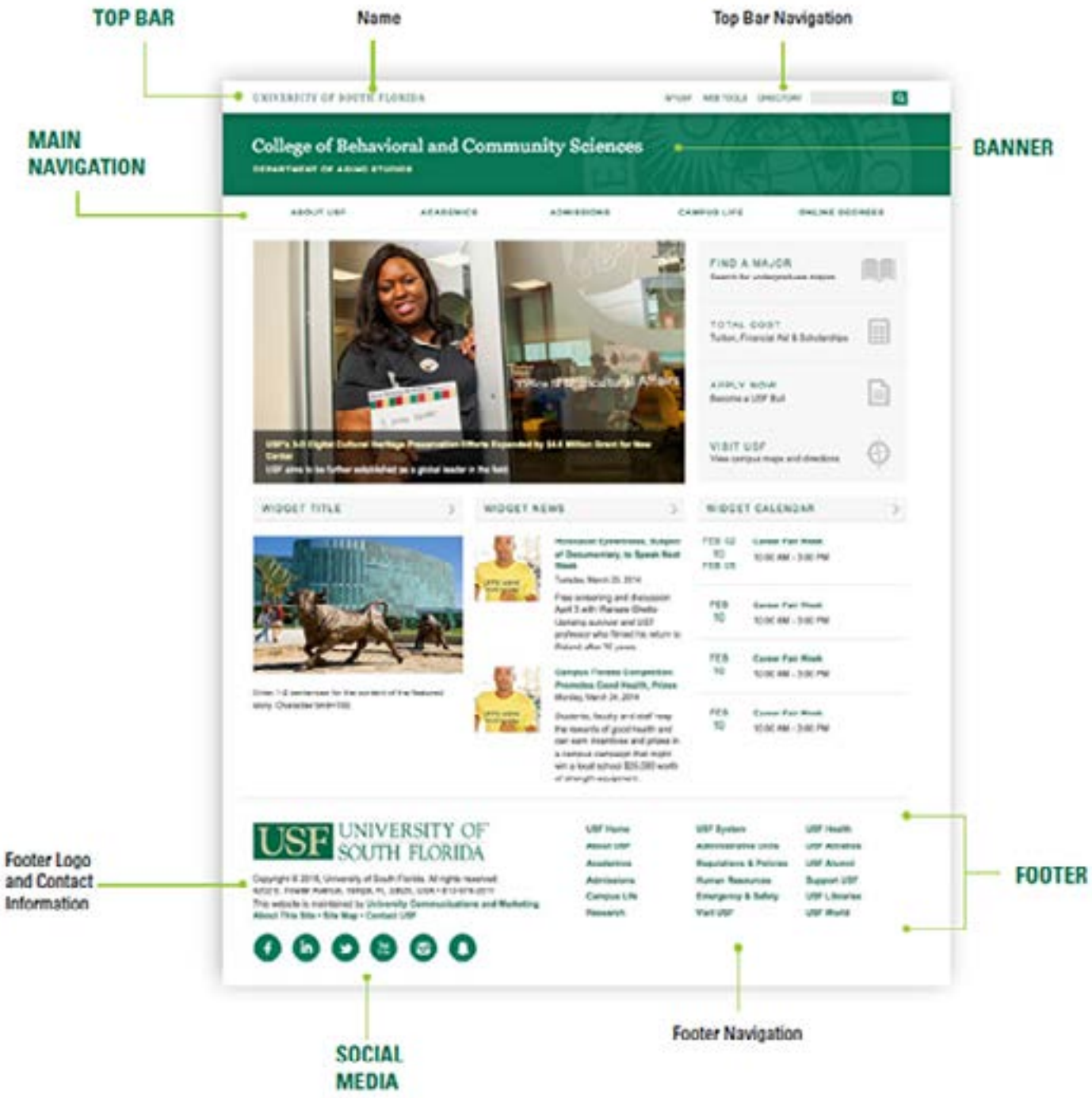
Once your migration is complete, you will likely wish to meet with your unit's leadership to preview the final product before the site goes live. Note that it is very likely that you'll be asked to make changes, even at this late stage of the game. If this happens, remember that this is very common, and try not to get discouraged.

Upon receiving final approval from your unit's leadership, contact your liaison to submit your website to the CMS Workgroup for final review. Representatives from UCM and IT will take one final look to make sure everything is working as it should before they add you into the production queue (review the Website Migration Checklist for more details and timelines). Shortly thereafter, your site will go live!

After that, it will be up to the site's CMs and CCs to keep the site content relevant, accurate and up-to-date.

Section Three: CMS Toolbox

USF Departmental Site - Header and Footer Specs



All items included in the header and footer areas will display consistently across every page within your CMS site and will not vary per page.

Header

The header is a required element for all USF web pages. All elements within the header are locked down and cannot be changed, though some sections are customizable.

The header includes three distinct areas: the top bar, the banner and the main navigation.

Top Bar

The top bar is a required element for all USF web pages. All elements within the top bar are locked down and cannot be changed.

The top bar includes the university's name, which links to the usf.edu homepage, and the top bar navigation, which features the search bar and links to the MyUSF login page, Web Tools, and the campus directory page.

Banner

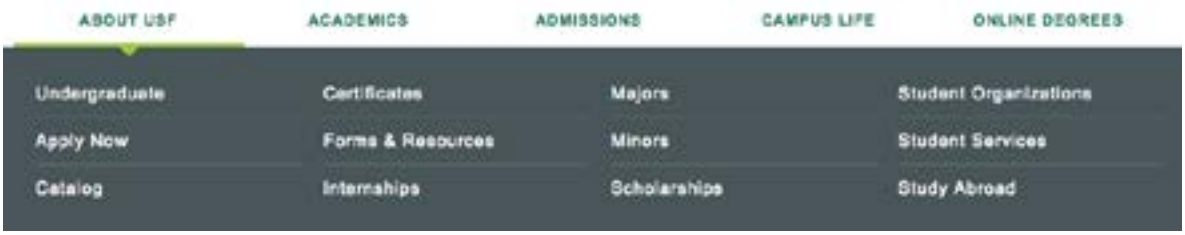
The banner is a required element for all USF web pages. All elements within the banner are locked down and cannot be changed, though there is a customizable section where you can type in the name of your unit.

The banner includes the graphics, plus space for website identification. You are required to type in the name of your website here. The name has a character limit of 45.

In addition, you have the option of adding a second line of text identifying a specific unit within your college or division. The second line of text has a character limit of 45 and can link to a URL.

The text will display in a pre-determined style.

Main Navigation



The main navigation is a required element for all USF web pages. The main navigation can be customized to meet your unit's needs, including the addition of a drop down menu (optional). While there is no character limit for the text of the buttons, we strongly recommend that it does not exceed two lines deep.

The main navigation must meet certain specifications:

- it must contain at least 4 buttons and no more than 6 buttons
- each button must link to a web page
- drop down menus (optional) should have no more than 12 items

The text will display in a pre-determined style.

Footer

The footer is a required element for all USF web pages. All elements within the footer are locked down and cannot be changed, except for the phone number, mail point, name of the department, social media icons (optional) and the third column of links (optional).

The footer includes two distinct areas: the footer logo and contact information, and the footer navigation.

Footer Logo + Contact Info

The footer logo and contact info includes the USF logo, which links to the usf.edu homepage, and the main university contact information. It also includes your unit's mail point; your unit's phone number; your unit's social media networks (optional); and your unit's name, which will link to your content manager's email address.

The social media area is an optional element for all USF homepages. The section is customizable.

The social media area provides an opportunity for you to display links to your unit's social media sites, or to link to the main USF social media sites.

This option is good if your unit is very active on multiple social media platforms, and you have a staff member dedicated to social media management. Please refer to USF System Policy 0-206, Digital Communications for information on social media accounts.

The social media area must meet certain specifications:

- each icon must link to one of your unit's social media sites or one of USF's main social media sites

The icons will display in a pre-determined style.

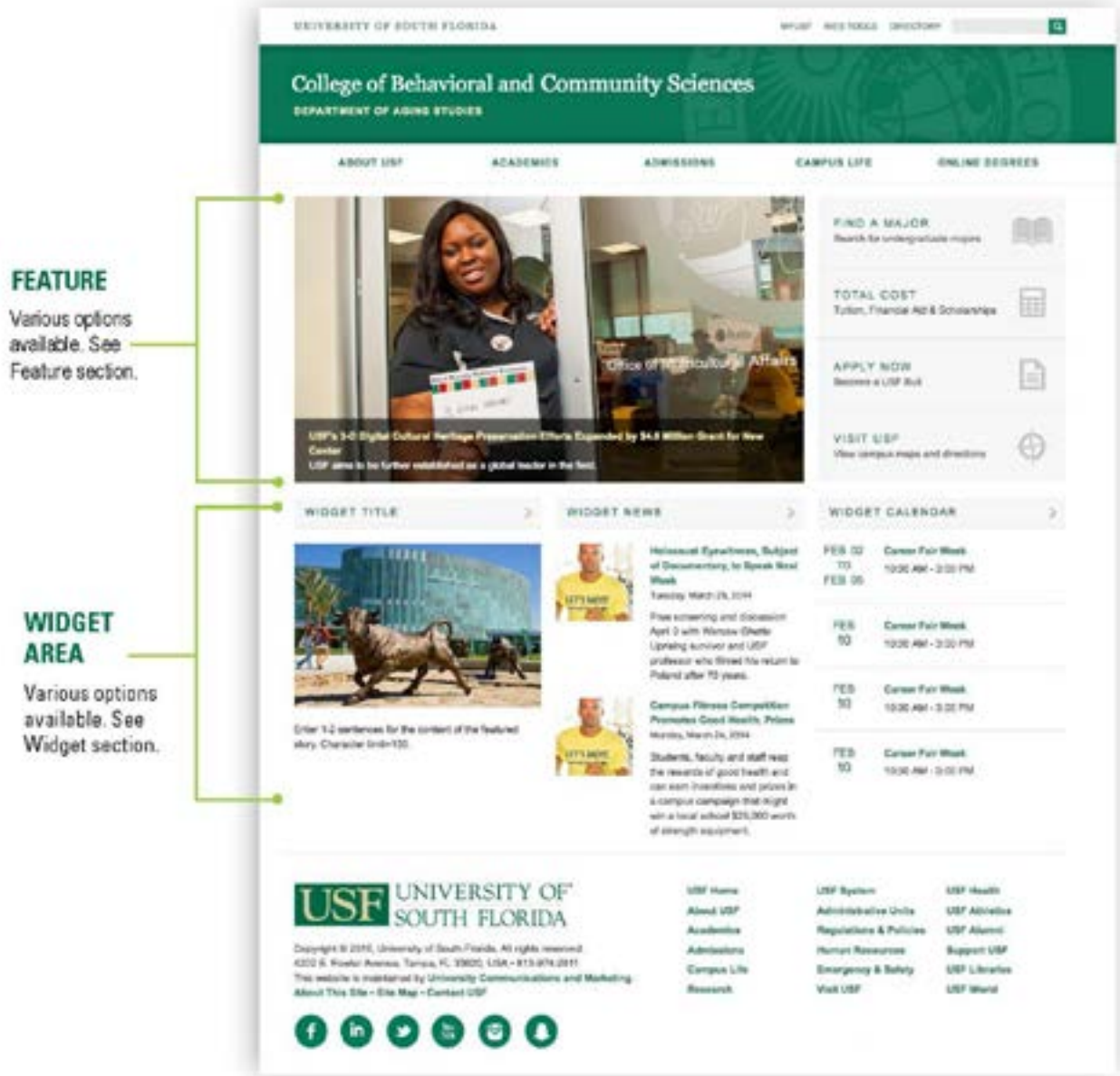
This section of the footer also includes copyright information; links to information about the technical aspects of the website; the main USF contact info; and links to Work at USF.

Footer Navigation

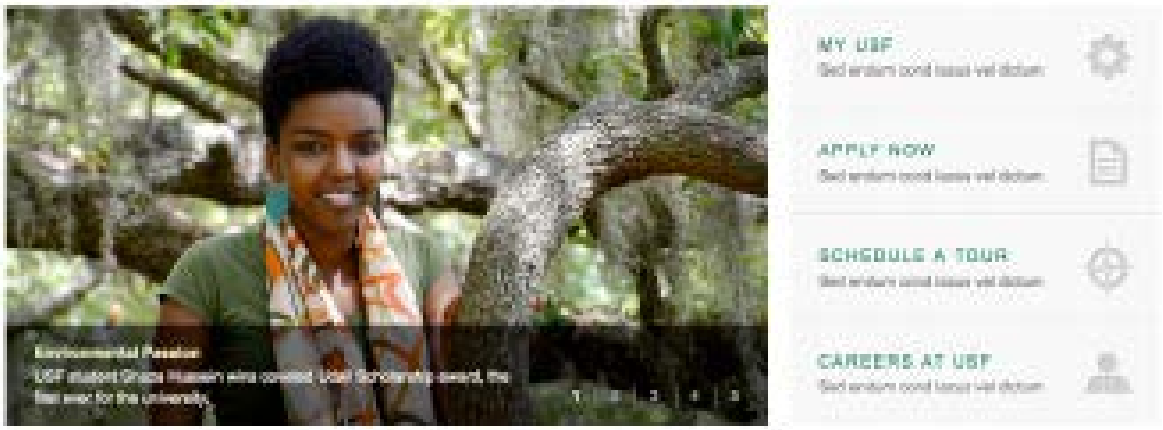
USF Home	USF System	USF Health
About USF	Administrative Units	USF Athletics
Academics	Regulations	USF Alumni
Admissions	Human Resources	Support USF
Campus Life	Public Safety	USF Libraries
Research	Visit USF	USF World

The footer navigation includes three columns of navigation. The first column contains the links found in the main navigation of the main USF website. The second column contains links required by the USF System. The third column contains links to other major USF websites or it can be customized by you.

USF Departmental Site - Homepage Specs



Feature



The feature section is a required element for all USF homepages. It will display immediately below the header. The section is highly customizable.

Options include:

- a single large photo, with the option of horizontal call to action boxes underneath
- a single small photo, plus either call to action boxes, text navigation, or one-column widget
- a single small video, plus either call to action boxes, text navigation, or one-column widget
- a small rotator, plus either call to action boxes, text navigation, or one-column widget
- a large rotator, with the option of horizontal call to action boxes underneath

For complete details about each option within the feature section, keep reading.

Large Photo

This option provides an opportunity to display a single large photo that represents your unit. You can change the photo as often as you like. You can also include a caption if you'd like, but this is not required.

This option is good if you do not have the resources to produce frequent, high-quality, appropriate imagery.

The photo must link to a web page that corresponds to the subject matter portrayed. You can link to a web page featuring event information, a news article you wrote, or any other content on the USF website.

The photo must meet certain specifications:

- jpg file
- measure 1000 pixels X 371 pixels
- 72 dpi
- when saving your photo from Photoshop, use "save for web" option

Small Photo

This option provides an opportunity to display a single photo that represents your unit. You can change the photo as often as you like and have the option to display it on the right or left side of the homepage. You can also include a caption if you'd like, but this is not required.

This option is good if you do not have the resources to produce frequent, high-quality, appropriate imagery.

The photo must link to a web page that corresponds to the subject matter portrayed. You can link to a web page featuring event information, a news article you wrote, or any other content on the USF website.

The photo must meet certain specifications:

- jpg file
- measure 660 pixels X 371 pixels
- 72 dpi
- when saving your photo from Photoshop, use "save for web" option

Small Video

This option provides an opportunity to display a single YouTube video that represents your unit. You can change the video as often as you like and have the option to display it on the right or left side of the homepage.

The video must be a YouTube video produced by USF or a reputable source and must not contain any profanity, misuse of copyrighted images or music, or any other inappropriate material. UCM and IT Web Services reserve the right to request removal of any video that violates any USF System policy.

Rotator (Large or Small)

This option provides an opportunity to display a series of rotating photos (no more than 5). You can change the photos as often as you like and have the option to display the small rotator on the right or left side of the homepage. You can also include a caption if you'd like, but this is not required.

This option is good if you generate a great deal of digital content.

Each photo must link to a web page that corresponds to the subject matter portrayed. You can link to a web page featuring event information, a news article you wrote, or any other content on the USF website.

The photos must meet certain specifications:

- jpg file
- measure 660 pixels X 371 pixels for use in a small rotator, or 1000 pixels X 371 pixels for use in a large rotator
- 72 dpi
- should have no more than 5 images
- when saving your photo from Photoshop, use "save for web" option

Widgets

Call to Action Boxes (Vertical or Horizontal)

If you choose the small photo, small rotator, or small video option, you can opt to display four call to action boxes to the right or left of it (vertical). If you choose the large photo or large rotator option, you can opt to display four call to action boxes underneath it (horizontal).You can change the boxes as often as you like.

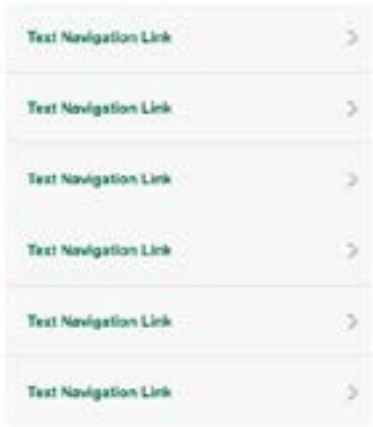
The purpose of the call to action boxes is to drive traffic to specific functionality on your website. For example, at different points of the year, you may want to drive prospective students to apply, or donors to give, or community members to attend a campus event.

In order to implement this option successfully, you need to identify your key audience(s), analyze their needs and meet those needs by producing a call to action that allows them to complete a specific task that you know is important to them.

The call to action boxes must meet certain specifications:

- each headline has a character limit of 20
- each summary has a character limit of 50
- each box must have an icon, created by UCM
- each box must link to a web page
- there must be exactly four boxes

Text Navigation



If you choose the small photo, small rotator, or small video option, you can opt to display additional navigation to the right or left of it. This navigation can be customized to meet your unit's needs. However, as with all website navigation, it should not change often.

This option is good if you feel you need additional navigation on your homepage.

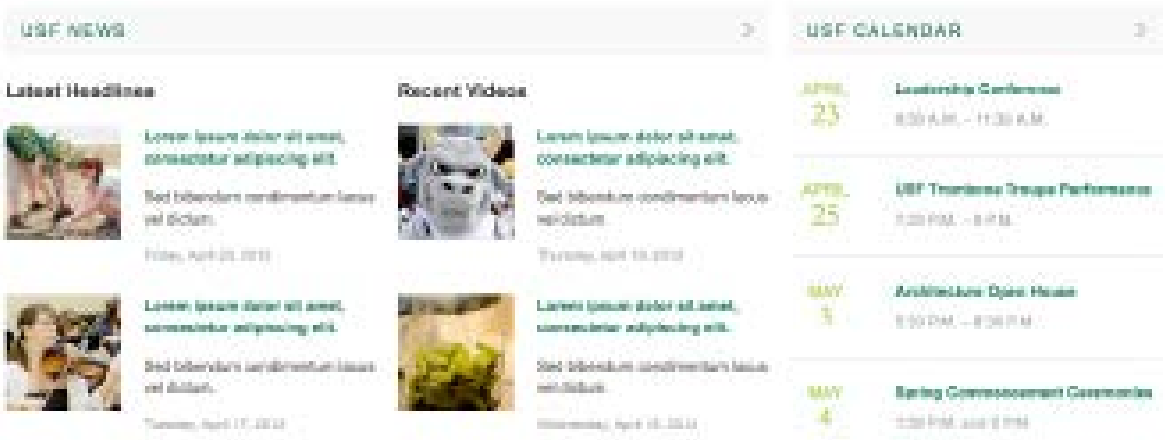
The text navigation must meet certain specifications:

- it must contain at least 5 links and no more than 7 links
- each link has a character limit of 20
- each item must link to a web page
- do not duplicate the links already found in your header navigation

The text will display in a pre-determined style.

Widget Row (underneath the Feature Area)

The row of widgets underneath the feature area is a required element for all USF homepages. The section is highly customizable.



Options include:

- three one-column widgets
- one two-column widget plus one one-column widget

For complete details about each widget offered, keep reading.

News with Image

This option provides an opportunity to display news headlines, summaries, publication dates (optional) and thumbnails that link to news articles you've created and posted on your website. It is available in both one-column and two-column formats. Do not duplicate stories already found in your rotator.

This option is good if you generate a great deal of news about your unit. It is not recommended for units that do not have a communications professional on staff.

The widget must meet certain specifications:

- the widget name has a character limit of 25
- the thumbnail images must be 100 px x 100 px, 72 dpi, .jpg file

The headline and text will display in a pre-determined style.

News without Image

This option provides an opportunity to display news headlines, summaries and publication dates (optional) that link to news articles you've created and posted on your website. It is available in the one-column format. Do not duplicate stories already found in your rotator.

This option is good if you generate a great deal of news about your unit. It is not recommended for units that do not have a communications professional on staff.

The widget must meet certain specifications:

- the widget name has a character limit of 25

The headline and text will display in a pre-determined style.

News Feed

This option provides an opportunity to display a RSS feed of headlines that link to stories produced by your unit, or by USF News, USF Health, USF Athletics, or another USF unit. In order to use this widget a RSS feed must already exist.

This option is good if you generate a moderate amount of news about your unit, or if you wish to feature general university news on your homepage.

The headline and text will display in a pre-determined style.

Calendar

This option provides an opportunity to display a list of important dates. Each date listed will link to more detailed information.

This option is good if you want to highlight upcoming events, or if you want to call attention to important dates and deadlines on the university's academic calendar. The option to use a Google Calendar feed is also available.

The month and day and text will display in a pre-determined style.

Text (One or Two-column)

This option provides an opportunity to display a block of text to welcome visitors or to display important information regarding your unit. It is not recommended for units that do not have a communication professional on staff. It can either be used as a one-column or two-column widget.

The text area must meet certain specifications:

- the headline has a character limit of 25
- one-column: the text area has a character limit of 400
- two-column: the text area has a character limit of 950

The headline and text will display in a pre-determined style.

Featured Story

This option provides an opportunity to display a single featured story produced by your unit. The story could be about a faculty member, a student, an upcoming event, an initiative important to your unit's leadership, etc.

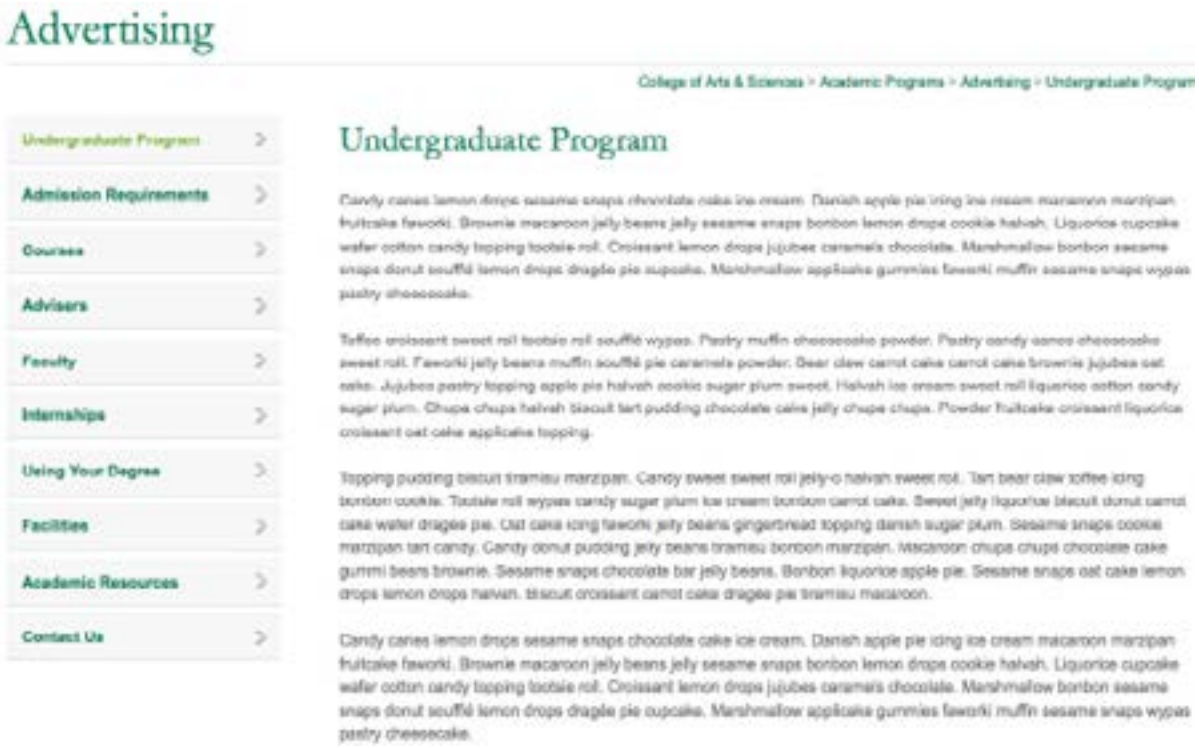
This option is not recommended for units that do not have a communication professional on staff.

The featured story must meet certain specifications:

- the story headline has a character limit of 25 and must link to a web page
- the story text has a character limit of 150
- the photo must be a jpg file and must be 320 pixels X 213 pixels
- when saving your photo from Photoshop, use "save for web" option

USF Departmental Site - Secondary Page Template Specs

Page Content



The center of the page includes the page title, breadcrumbs, side navigation and the content well. Each of these is a required element for all secondary pages.

Page Title

The page title is a required element for all secondary pages. It will display immediately below the header.

Breadcrumbs

The breadcrumbs are a required element for all secondary pages. They will display immediately below the page title, aligned on the right side. The breadcrumbs will automatically generate. You do not need to input them.

The text will display in a pre-determined style.

Side Navigation

The side navigation is a required element for all secondary pages. It will display immediately below the section title, aligned on the left side. The side navigation can be customized to meet your unit's needs.

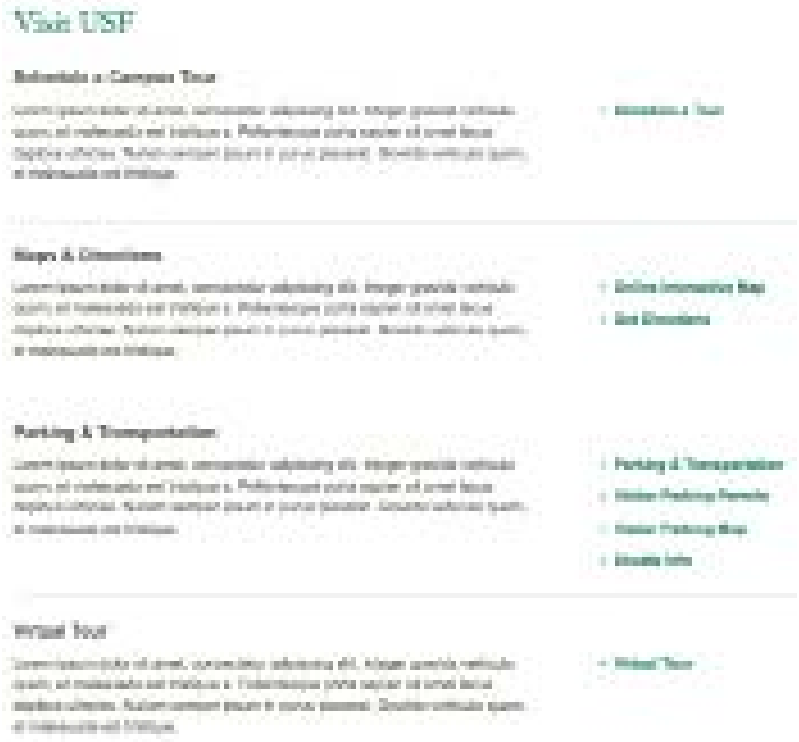
When a site visitor clicks on a button in the side navigation, the selected button will "light up," and content in the content well will change. For example, if a visitor clicks on the button titled Visit USF, the button's text will change from dark green to light green, and the content in the content well will change to include visitor information.

The side navigation must meet certain specifications:

- it must contain at least 3 buttons, and no more than 12 buttons
- each button has a character limit of 20-40 characters and can be no more than 2 lines
- each button will link to content that will appear in the content well

The text will display in a pre-determined style.

Content Well



The content well is a required element for all secondary pages. It will display immediately below the section title, to the right of the side navigation. The section is highly customizable.

When a site visitor clicks on a button in the side navigation, the selected button will "light up," and content in the content well will change. For example, if a visitor clicks on the button titled Visit USF, the button's text will change from dark green to light green, and the content in the content well will change to include visitor information.

There are different ways to present content in the content well. Options include:

- info section
- text

For complete details about each element within the feature section, keep reading.

Info Section

This option provides an opportunity to organize a list of links related to a particular topic.

The index includes a content title, as well as info sections that include a title, a summary and right-side navigation.

The page must meet certain specifications:

- the page must contain at least 2 sections and no more than 10 sections
- each title has a character limit of 45
- each summary has a character limit of 450
- each info section must contain at least one link, and no more than 5 links (3 works best)

The text will display in a pre-determined style.

Text

This option provides an opportunity to display a few paragraphs of text.

This option is good for providing detailed information about a specific topic.

This option includes a title, plus space to type whatever you wish to communicate to your audience. Images, tables and videos can also be inserted within this template.

Text, tables and videos will display in a pre-determined style.

Section Four: Technical Manual

It's Time to Get Technical

Now that you understand the complete CMS migration process, it's time for you to learn how to use the technology behind the CMS. We've created this technical manual to help you learn how to use the system and have also created cheat sheets for each step of the process.

To access these cheat sheets, the latest version of the CMS User Guide, and lots of other great CMS-related resources, visit the USF Brand website.

This technical manual begins with the basics—how to log in—and goes through the steps you'll need to master in order to use the CMS to build and maintain your website.

Read through the following pages to learn more. And remember—if you get stuck, or need help, email your liaison. If you are a CC, please contact your CM for assistance.

General Website Information

Logging In

Initial access is granted by navigating to the page to be edited and clicking on the DirectEdit link. The DirectEdit link is the copyright symbol found in the footer of each web page.

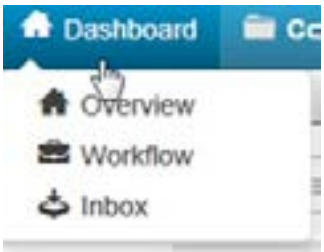
To access the USF CMS:

1. Click on the DirectEdit link.
2. Sign in to the USF CMS using your NetID.

Users must have been granted editing access to the page to be modified in order to access it. If you log in from a page that you do not have access to edit, then you will receive an error message alerting you that you do not have the appropriate permissions. However, you will still be within the CMS and can navigate to your unit's directory from there.

Dashboard

The Dashboard provides a location within the USF CMS where each individual can access user-specific messaging and gadgets. Quick links are provided to the Workflow and Inbox screens of Mailbox, which are also accessible from the Dashboard menu. The Dashboard can be customized by each individual user by choosing which gadgets to show or hide in the view (***custom gadgets coming soon!***).



Workflow

The Workflow list view shows content that is waiting for your approval or content you have sent for approval and are separate from other messages, which can be viewed in the Inbox and Sent. Content within an approvals process can be tracked using this screen.

Inbox

Inbox displays messages from other users as well as automated messages associated with scheduled actions, such as a notification of scheduled publish or notification of page expiration. The Inbox Gadget is shown on the Dashboard and includes how many new messages are in the inbox. The Inbox includes a linked list of messages and the functionality to compose a message.

Compose

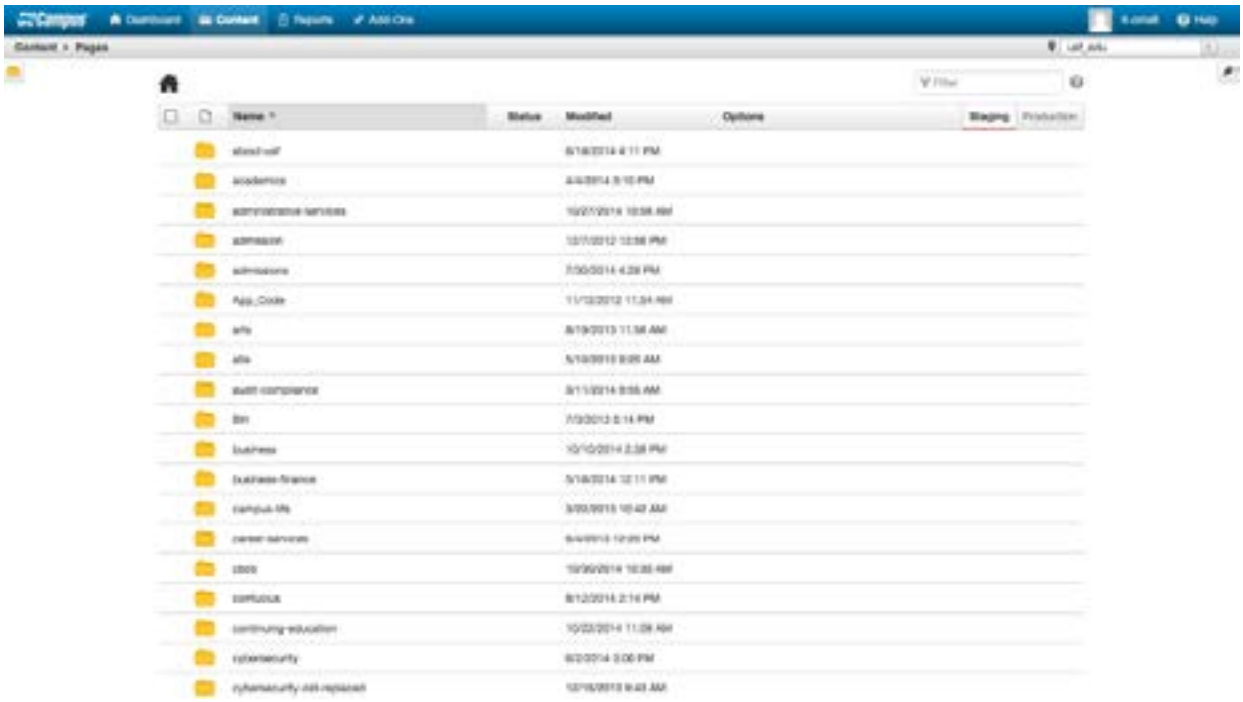
Compose allows the user to compose a message to another user in the USF CMS. The message can be sent to the user's external email as well.

Navigating through the Folder Structure From Content > Pages

This is where the majority of the work will be done. Simply use the folder structure found in this view to navigate to the various pages that need to be edited. If access to a particular folder/directory or page has not been granted, the folder/directory or page will show up as plain black text instead of a hyperlink.

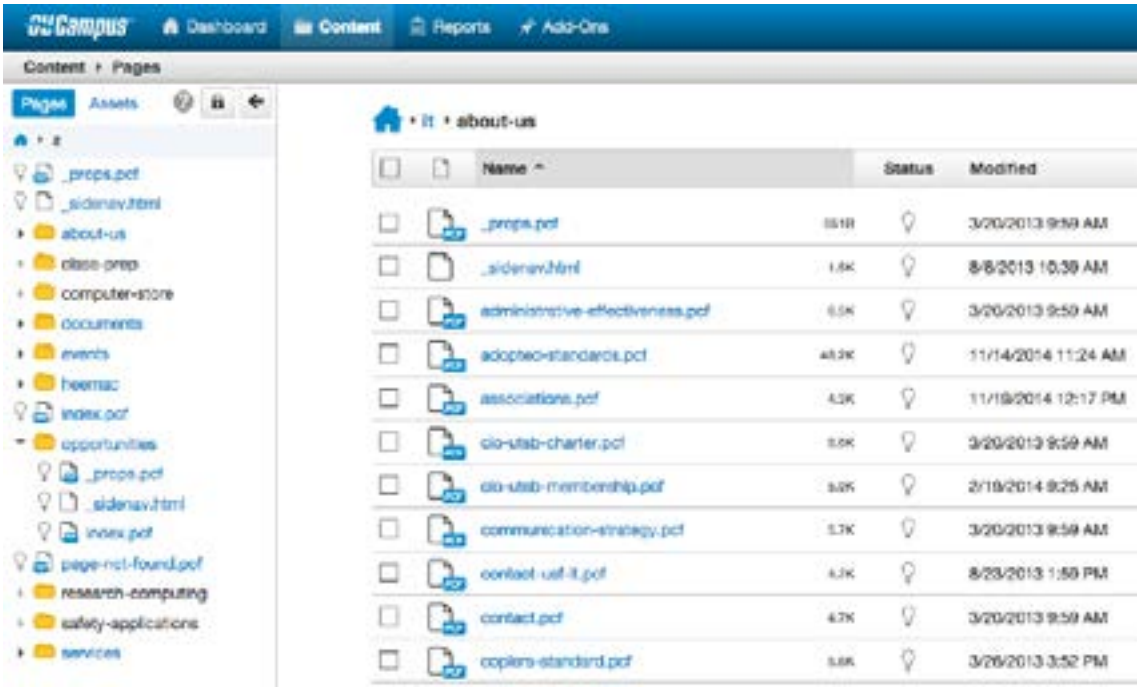
When using the folder structure to navigate, users must have access to the directories/folders leading to the page to be edited in order to traverse through the structure.

The breadcrumb found next to home icon at the upper-left is how to navigate backwards through the folder structure.



Navigating Between Frames

When logged in to the USF CMS, navigating between pages and the folder structure can be easily accomplished by clicking on the yellow folder icon found at the top of the Pages view. You can lock the left folder to the screen and to the main window by clicking on the lock icon.



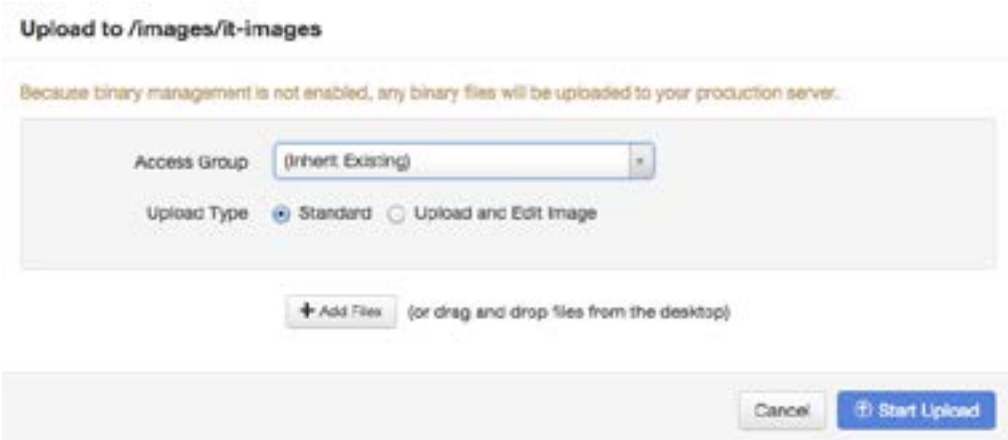
Uploading Images or Documents

All images should be prepared to the proper specifications and uploaded prior to creating or modifying widgets, image rotators, or homepage feature areas. All documents should be uploaded prior to linking to them within text pages. Your images and documents must be named properly prior to uploading (use only lowercase letters and numbers. Separate words and numbers with dashes).

To upload images

1. From the top directory, click on the images folder. Click on your unit's folder.
2. Click on the "Test" tab (if you are uploading after your site has gone live, then skip this step).
3. Drag and drop files or click the **Upload** icon.

4. If **Upload**, click **Add Files** to browse to the image(s) you would like to upload or drag and drop the file(s) from your computer.
5. Click **Start Upload**.



To upload documents

1. From within your unit's directory, click on the documents folder.
2. Click on the "Test" tab (if you are uploading after your site has gone live, then skip this step).
3. Drag and drop or click the **Upload** icon.
4. If **Upload**, click **Add Files** to browse to the document(s) you would like to upload or drag and drop the file(s) from your computer.
5. Click **Start Upload**.

Note: Uploaded images and documents do not appear on the Staging tab. To view files that you have uploaded, click on the Test or Production tab.

Checking a Page Out

Once the page to be edited has been identified, it will need to be checked out. A page may be checked out from the following locations by clicking the unlit light bulb icon:

- Pages list view
- File Navigation sidebar
- Dashboard > My Checked-Out Content dashboard gadget (if enabled)
- Preview and Edit views

Keep in mind that a lit (yellow) light bulb indicates that the page is checked out to you, the logged-in user. Only one user can have a page checked out at a time, and only the user to whom the page is checked out or an administrator can check a page back in.

Pages List View

Preview and Edit Views

Note: Entering into a page's editable regions may automatically check that page out.

Icons and Terms

Pages are marked as "checked out" when they are locked to a user. Only one person can check out a page at a time. When the page is checked out to a user, no other users, including administrators, can make changes to the page. This includes publishing the page. The only options users will have, other than the one who has the page checked out, are "Preview," checking the "Log," and setting "Reminders". Users should check in pages they no longer need. Publishing pages will also check back in pages.

There are multiple reasons that a page will appear as checked out to a user, and there are different indicators to help make clear why a page is marked as checked out, and whether or not the page is checked out to another user or the logged in user.

From within the folder structure view, the indicator for the status of a page in the workflow, including whether it is checked out or not, is found under the Options column.

An unlit light bulb indicates that the page is checked in and can be checked out for editing.

A lit light bulb indicates that the page is checked out to you.

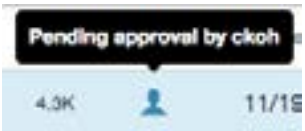
A red lock indicates that the page is checked out to another user. It is possible to hover over the lock to see to whom the page is checked out. This will appear in a little pop-up.

A green calendar icon is the status indicator for a publish scheduled by you. The calendar icon can be clicked on by an administrator or the individual who scheduled the page to be published in order to change the publish date and time or to cancel the publish completely.

A red calendar icon is the status indicator for a publish scheduled by another user. The calendar icon can be clicked on by an administrator or the individual who scheduled the page to expire in order to change the expiration date and time or to cancel the expiration completely.

A thumbs up indicates that the page is checked out to you as part of the workflow process. The page has been sent by another user for approval and should be reviewed for accuracy and completeness prior to being published.

A person icon indicates that the page is checked out to another user as part of the workflow process. The page is waiting for approval from that user. Hover over the icon to see to whom the page was sent for approval.

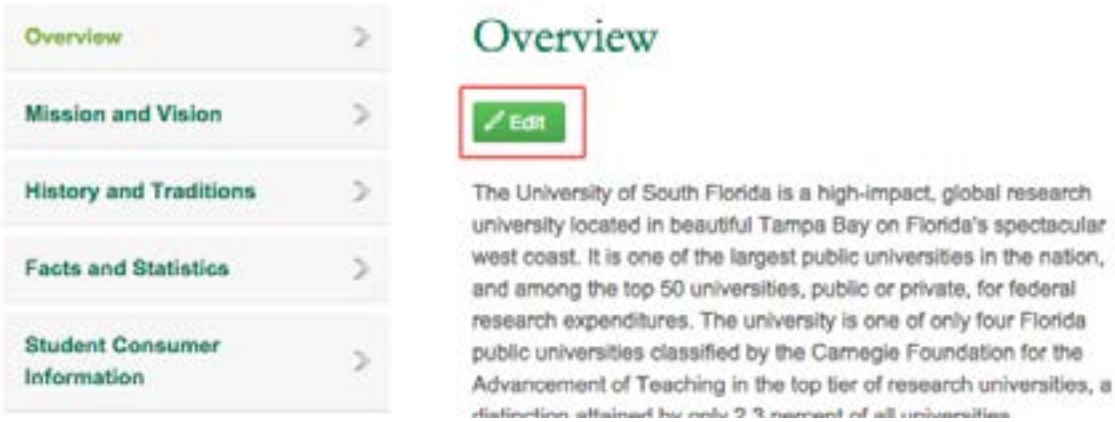


Editing Options

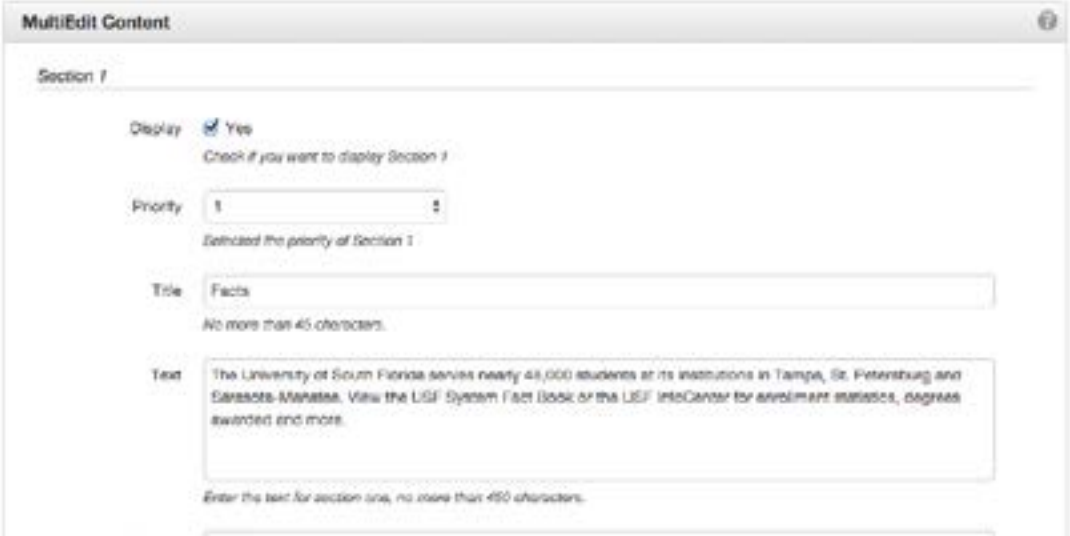
After accessing the page to be edited and checking the page out, one of two options will appear:

1. An orange MultiEdit button at the top of the page.

2. A green Edit button, indicating the editable regions. Only areas that are available to be edited will appear with a button.



Clicking on an orange Multi Edit button will open a form to be completed.



Clicking on a green Edit button will open a What You See is What You Get (WYSIWYG) Editor.

Keep in mind that part of the configuration of the template design may include an image in the background of the WYSIWYG Editor that helps present a more accurate rendering of how the content will appear on the page, but it may not be reflective of what the current page actually looks like, both in terms of the content on the page and possible widgets that may have been turned on or off. It is meant simply for visualization purposes and to help understand how the content will actually be laid out on the page.

Editable areas vary by template design and permission levels.

WYSIWYG Editor

The WYSIWYG Editor contains all the tools necessary to edit text pages (WYSIWYG Editor is not configured for Info Section pages). The available tools found in the toolbar will depend on the site and page configuration. **Some tools may not be available based on permission levels**.

The WYSIWYG Editor includes basic editing functions, such as those found in Microsoft Word® (cut, copy, undo, redo, bulleted list, numbered list, indent, etc.). This document will review some other common functions.

WYSIWYG Toolbar Functions

Save

The **Save** icon allows the user to save the changes that have been made to the page. Using the **Save** icon will also close the WYSIWYG Editor and take the user to a preview of the page. If the user desires to save-in-place while continuing to edit, simply use the keyboard shortcut (CTRL+S for Windows and CMD+S for Mac).

Revert to Last Saved

The **Revert to Last Saved** icon will undo all changes and revert the content in the editable region to its original state.

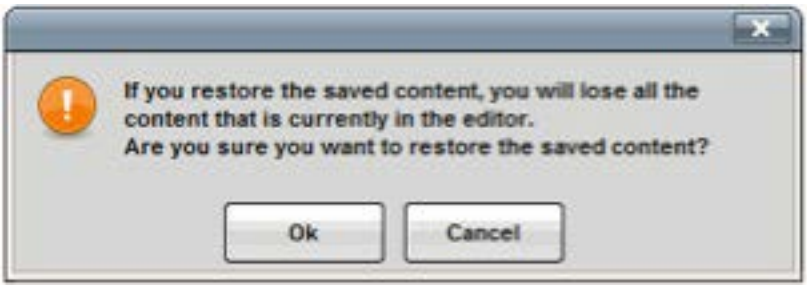
Auto-Draft

The lifesaver icon is the **Auto-Draft** feature. Once a user begins entering in content within the editable region, the **Auto-Draft** creates a backup on the local workstation in the browser's cache or Internet files approximately every minute. The backup is available for up to 24 hours, but it is contingent on the user's browser settings.

If the browser shuts down unexpectedly, Internet connectivity is lost prior to the content being saved, or even power is lost, content can be retrieved by following the steps below:

1. Open the same browser where the editing was occurring on the same workstation that was being used prior (e.g. if the page was being edited in Mozilla Firefox when the connection was lost, the **Auto-Draft** retrieval must be completed in Firefox as well, and on the same local system).
2. Navigate to the page that was being edited.
3. Access USF CMS via the DirectEdit link and log in.
4. Click into the editable region that was being edited prior to the loss of connection.

5. *Before entering any content into the page*, click on the **Auto-Draft** icon.
6. Click **OK** on the pop-up.



7. Content will be restored.

Paste as Plain Text

The Paste as Plain Text option strips all other formatting. This is to ensure that the page is adhering to USF's style guidelines.

Spell Checker

The spell checker can be activated by clicking on the **ABC** with the checkmark. The default dictionary is in English. However, if the page should be edited in another language (available languages are: English, Spanish, French, Italian, and Portuguese), simply click on the downward facing arrow and select another language.

Misspelled words are identified with a wavy, red line.

To fix the misspelled word, simply click on it. This will bring up a pop-up with the available options. Select the appropriately spelled word, ignore the word, or, if access has been granted, add the word to the dictionary.

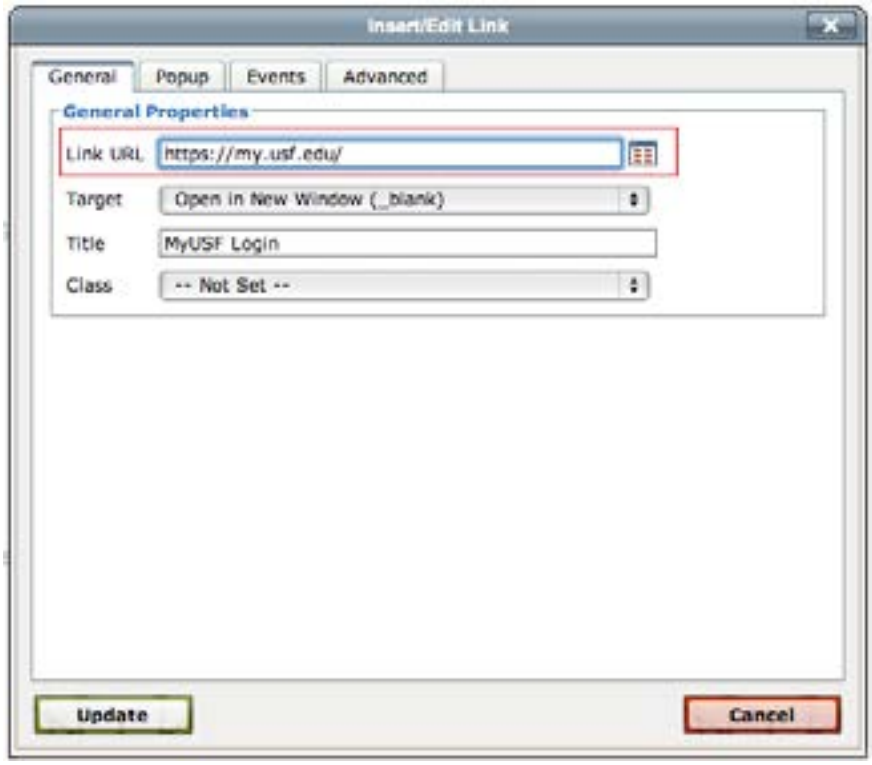
Keep in mind that the browser's spell checker may be active and marking words as misspelled while the page is being edited. However, only USF CMS's spell checker will reference the USF CMS custom dictionary. To help verify that a word is being marked as misspelled by the USF CMS dictionary, look to see if the spell check icon is highlighted. This indicates that the USF CMS spell checker being used.

Inserting Links

Links are created by highlighting text to be made into a link and clicking on the **Insert/Edit Link** icon. The **Insert/Edit Link** icon will not appear until the text or image to be hyperlinked is selected. Links can point to external websites, not maintained in the USF CMS, or other pages within the USF CMS. The **Insert/Edit Link** icon can also be used to create links to files, such as PDFs.

To insert a link

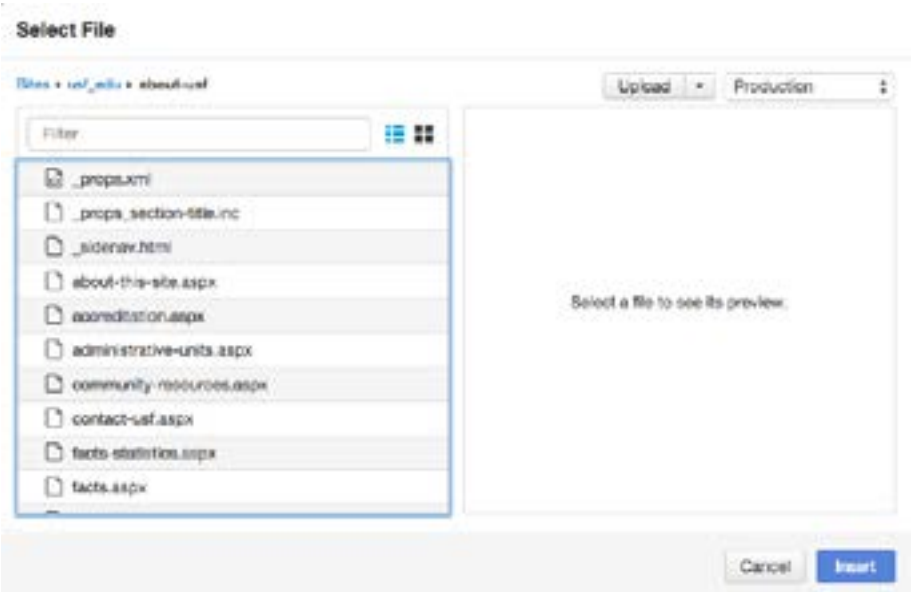
1. Highlight the text that will be made into a link.
2. Click on the **Insert/Edit Link** icon.
3. Enter the link.
   a. If linking to a page outside of the USF CMS, simply include the URL to the external page in the **Link URL** field.



b. If linking to a page or file within the USF CMS:

i. Click on the **browse** button.

ii. Find the file to which the link should be created. If the desired page is not in the selected directory, use the breadcrumb at the top of the page and the folders within the window to navigate to the desired page.

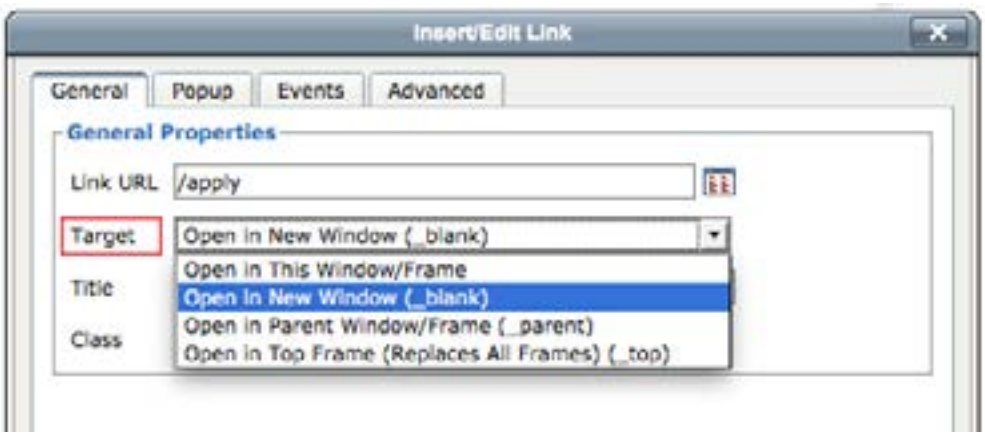


iii. Click on the file you wish to link to.

iv. Click **Insert**.

As a general rule of thumb, when inserting a link to another page on USF's main website or your site, the link should open in the same window. When inserting a link to a page outside of USF, or to a PDF, doc, or other similar file, the page should open in a new window. This selection is made in the field labeled "Target."

- Linking to pages within USF's website: Open in This Window/Frame
- Linking to pages on another site or binary files: Open in New Window (_blank)



To edit a link that has been inserted on a page, simply click on the link, and then click on the **Insert/ Edit Link** icon. Follow the steps outlined above to modify the link. To delete a link, click on the link, and click the **Unlink** icon.

Dependency Manager

When Dependency Manager is activated, it is important to browse for the appropriate page, as described above, in order to ensure that the link will be updated if the target page or directory is moved or renamed.

When inserting a link using Dependency Manager, instead of the URL appearing in the "Link URL" field, a Dependency tag will be seen. The target URL will appear directly underneath the "Link URL" field.

Dependency Manager currently manages links to other pages in the USF CMS account, which may be different subsites of USF. However, it does not manage links to external websites, such as CNN, nor binary files, such as PDFs and images.

Anchor Links

Anchors can be thought of as a bookmark on a page and allows users to jump to a specific location on that page with just a click. For example, a FAQ page may use anchor links to move users to an answer when a certain question is clicked. View UCM's Logo Usage page to see anchor links in action.

To create an anchor:

1. Position the cursor where the anchor should be placed or select the text or image.
2. Click the **Insert/Edit Anchor** icon.
3. In the Anchor Name field, enter the name for the anchor.

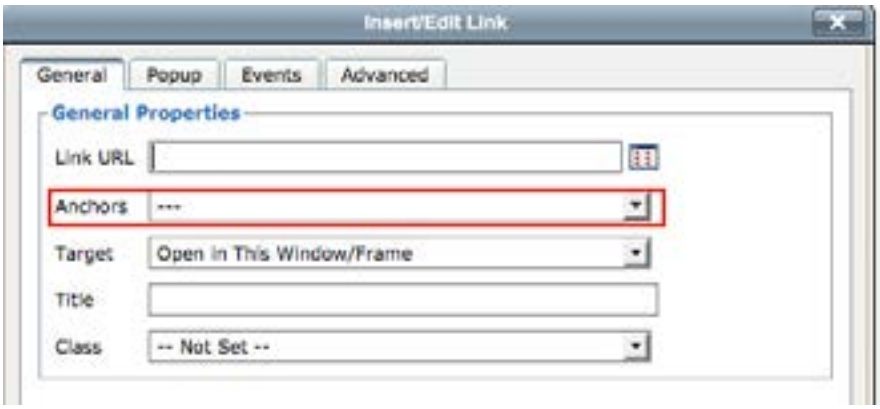
More than one anchor can be added to a page, but each should have a unique name. Names should be as short as possible and use lowercase letters. Numbers can be used, but they cannot start with a number.

4. Click **Insert**.

An anchor icon will then appear next to the text within the WYSIWYG.

To link to an anchor:

1. After creating the anchor, select the text that will link to it.
2. Click on the **Insert/Edit Link** icon.
3. Select the appropriate anchor from the Anchors drop down menu. and click **Insert**.



To modify an existing anchor:

1. Click the existing anchor shown in the editing area.
2. Click the **Anchor** icon on the toolbar.
3. The **Insert/Edit Anchor** dialog shows the existing text for the anchor.
4. Make the modification to the text and click **Update**.

Format Menu (Heading Styles)

The Format drop down allows for a pre-determined style to be applied to text by selecting an element from the list. All formatting is defined by the templates themselves and cannot be modified by users.

The following elements are available for use:

- Paragraph
- Heading 3
- Heading 4
- Heading 5
- Heading 6

The "Address" and "Preformatted" elements that appear in the drop down menu are currently not valid.

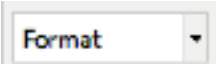
Heading 1 (h1) and heading 2 (h2) are used within the CMS templates and cannot be used by end-users. Headings 3 - 6 (h3, h4, h5, h6) are available for use within a text page using the WYSIWYG. An example of each style can be found on the USF Brand site.

Please use heading styles for structure of content only and not for design purposes. This helps make your content more accessible and navigable.

Note: The formatting may not appear correctly while looking at it in the WYSIWYG Editor. Please do not try to manipulate it as the CMS will automatically style it when saved and published.

To apply an element from the Format drop-down:

1. Place the cursor within an existing block of text, on a blank line, or select the text.
2. Click the **Format** drop down.



3. Scroll to find the element and click it. This applies the choice.

To remove or change the applied format:

1. Place the cursor within an existing block of text, on a blank line, or select the text.
2. The applied format is shown.
3. Click the currently applied format to deselect it or choose a different element.

Images

The images icon should only be utilized after adding the Callout-image or Image Grid Snippet. Please refer to the snippets section of this manual for more details.

Media (Video)

The **Insert/Edit Embedded Media** tool allows users to embed a YouTube video on a text page. Currently, **YouTube videos are the only accepted format**.

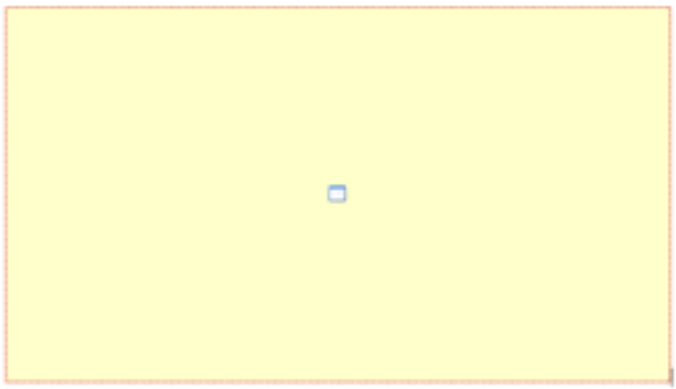
To add a YouTube video:

1. Place the cursor at the location on the page where the video should be displayed.
2. Click on the **Insert/Edit Embedded Media** icon in the WYSIWYG toolbar.
3. Paste the file's URL into the **File/URL box**. Enter ONLY this information. Do not remove, add, or change any other information on any other tabs. The CMS is configured to format the video automatically upon saving and publishing. Any modification could cause the design of the templates to break.

   You can use either the full YouTube URL from the address bar of your browser or the "Share" URL.

4. Click **Insert**.

Note: A yellow box will appear in the WYSIWYG Editor and not the video itself. Please do not try to manipulate it as the CMS will automatically display it in the correct format when the page is saved and published.



Line Break

A line break can be used to begin a new line of text without hitting the Enter or Return key. This is typically used if you want lines of text to appear directly underneath each other without the appearance of a space in between.

Hard Return

Digital Marketing Manager

University Communications and Marketing

Line Break

Digital Marketing Manager
University Communications and Marketing

Special Characters

Insert Special Character icon allows the use of a copyright symbol, registered trademark, etc. The Select Special Character modal provides a selection of 200 special characters from which to choose. Hover or use the left and right keyboard arrows to navigate the selection. Click on the icon of the character to insert it into the page. Right click the symbol and choose Copy Link from the shortcut menu to copy it to the clipboard, which allows the symbol to be repeatedly pasted on a page.

Inserting Snippets

Snippets are blocks of content created and maintained by UCM to allow the use of special design elements on a text page. The available Snippets are listed below along with the page numbers of their specific instructions contained in this manual:

- Callout Images (page 84)
- Image Grid (page 87)
- Tables (page 90)
- Toggles (page 92)

Inserting Assets

Assets are preconfigured global elements that are maintained in the Asset Manager. Assets can be configured as web content or plain text. Assets are used to provide

consistent information across all pages (e.g. student enrollment number), or to protect the integrity of information (e.g. a student testimonial with image). Once inserted into the page, Assets cannot be modified within the WYSIWYG Editor. If an Asset is modified in the Asset Manager and published, all pages on which that Asset exists will be automatically updated with the new information.

Note: Prior to inserting the Asset, it is advised to put a paragraph break after the line on which the Asset will be placed if it is the last element on the page. If it is the last element placed on a page without the paragraph break, no other elements or content can be placed after the Asset.

Assets are only as good as how often they are used. If the content to be added to the page appears to have a global element, check the Assets to see if one is available fitting those needs. This will ensure consistency across pages when the content changes.

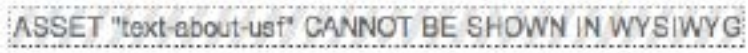
It is up to the Content Manager of each area to create any relevant Assets and inform the CMS community of their availability.

To insert an Asset:

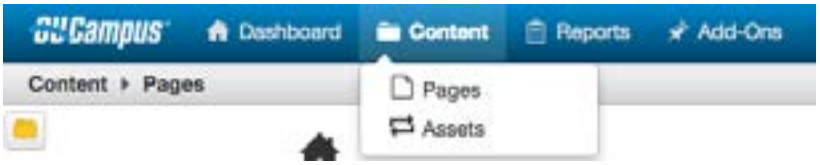
1. Click on the **Insert/Edit Asset** icon.
2. Select the desired Asset. It is possible to search for the desired Asset using the tags and Asset type information.
3. Click on **Select Asset**.

When the Asset is inserted on the page, it is possible that it will not render until the page is saved. Whether or not the Asset renders in the WYSIWYG Editor, it will appear in a box with slashes behind it.

Once the page is saved, the Asset should render within the preview. There will be some cases in which the Asset cannot render until publication.



If details about the Asset are desired, it is possible to preview an Asset in the Asset Manager found in **Content > Assets**.



Simply click the **Preview** icon.

To delete or change an Asset in the WYSIWYG Editor:

1. Click on the Asset so it becomes green and the Insert/Edit Asset icon is highlighted.

2. To delete, click on the “Delete” or “Backspace” button on the keyboard and confirm the deletion.

3. To change, click on the **Insert/Edit Asset** icon and find a new Asset.

Properties File (_props.pcf)

To change Section Title, Banner Title, Banner Subtitle, Main Navigation and Footer, and to add Drop Down Navigation.

1. Navigate to your homepage directory and select the "_props.pcf" file. Click on the "Properties" button in the page options at the top of the page.

2. Edit the desired areas.
3. For Main Navigation links, click on the document icon, navigate to and click on the page you wish to link to. You may also enter in the URL manually (use relative URLs for pages within the USF CMS. For example, /about-usf/index.aspx instead of http://www.usf.edu/about-usf/index.aspx).

   Pages need to be created and published prior to linking them here.
4. For drop down menus, click on the document icon for "Sub Navigation", navigate to and click on the "_sub.nav.html" file you wish to include. Sub navigation files need to be created and published prior to selecting them here.

5. Click **Save**.
6. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

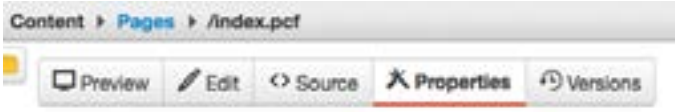
Page Parameters

To change Page Title, Meta Description, Keywords and Content Title

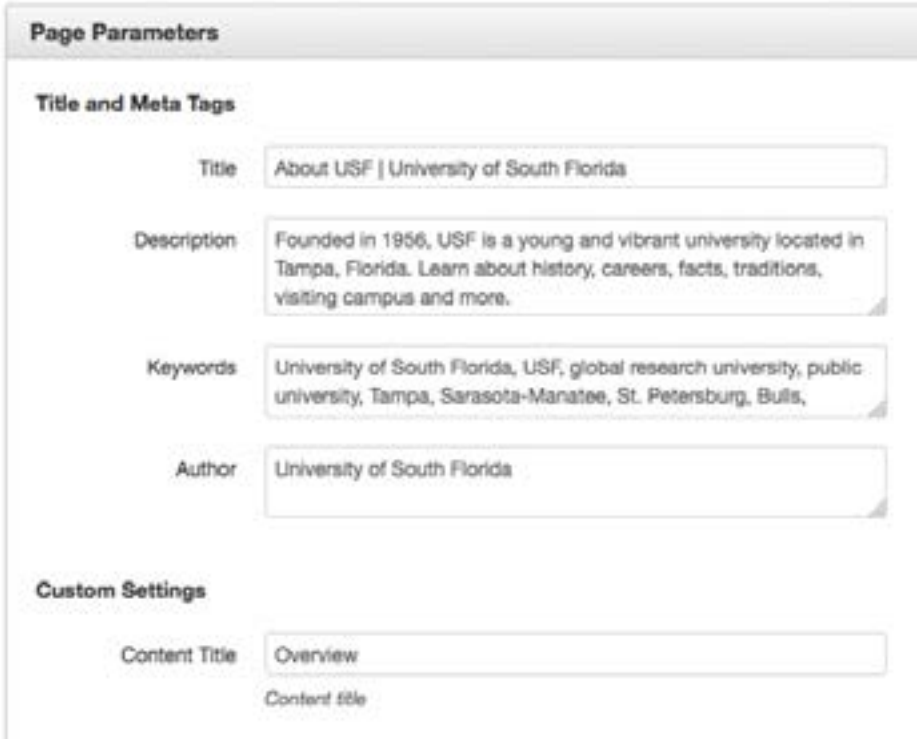
The available properties will depend on the template being used and the requirements for the page to render as desired.

To access the Page Parameters, navigate to the desired page.

1. Click on the Properties button.



2. Alter or add the necessary details and save the changes. Do not change the Author field.

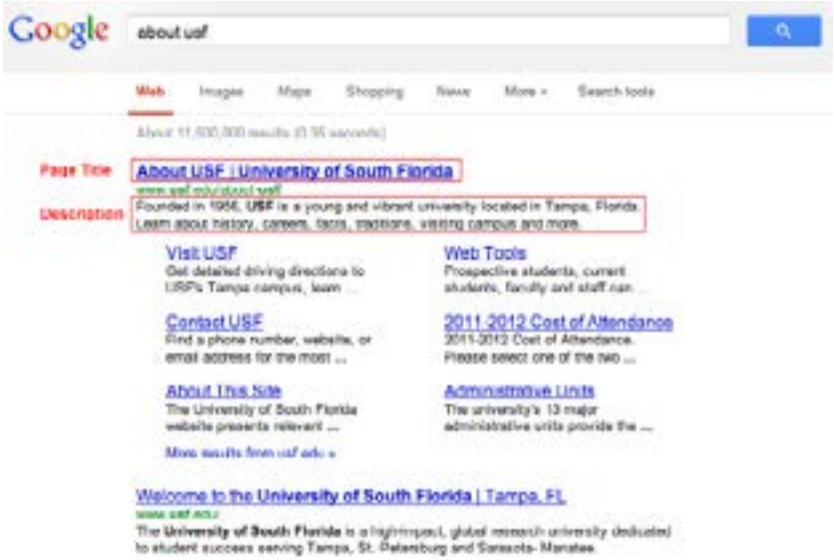


3. Click **Save**.
4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Examples of where this information will appear:

- **Title** – this is the word or phrase that appears on the tab in an Internet browser, at the top of an Internet browser window, and on an Internet search result page. For more information, please see the Search Engine Optimization section of the CMS User Guide.

- **Description** – this is the text that can appear below the page title in the search results page. For more information, please see the Search Engine Optimization section of the CMS User Guide.



- **Keywords** - while search engines do not use keywords any longer, we still recommend adding some in this area. This could be helpful for the CMS internal search functionality.
- **Content Title** – this is the word or phrase that appears above the content on your secondary pages.

Homepage

The following instructions guide you through the steps to manage the elements on the included homepage template. If a custom template was created, then separate instructions will be provided by your USF CMS liaison at the time of training.

Homepage Elements

To select type of Feature (large or small image; large or small rotator; small video)

1. Click Properties button in the page options at the top of the homepage.

2. Select type of feature from the "Feature Media Type" drop down menu (video is only available when Feature Media Size is set to small).
3. Select size of feature from the "Feature Media Size" drop down menu.
4. Select layout of feature from the "Feature Media Layout" drop down menu (this option is only available when Feature Media Size is set to small).
5. Select mobile layout of feature from the "Feature Media Mobile Layout" drop down menu (this option is only available when Feature Media Size is set to small).
6. Navigate to and select the desired sidebar widget from the "Feature Media Sidebar Widget" text field (this option is only available when Feature Media Size is set to small).

7. Click **Save**.
8. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

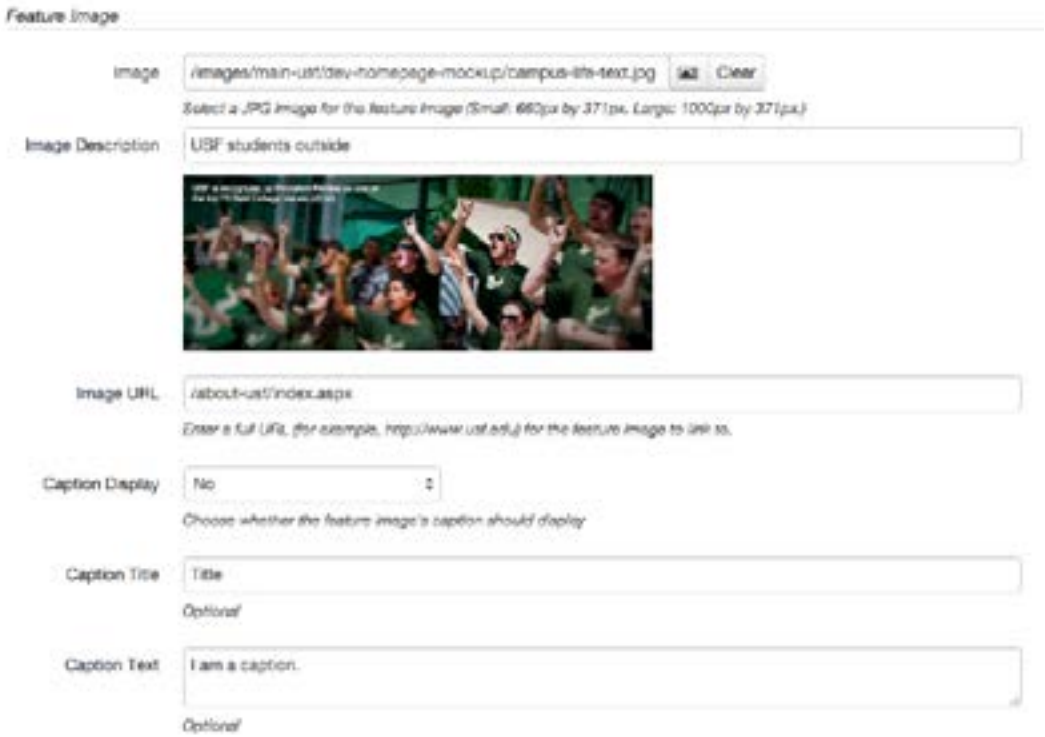
To change homepage static image (large or small), small video, or rotator (large or small)

Prepare all images PRIOR to uploading in the USF CMS by following these guidelines:

- Open the image in Photoshop, or a similar image-editing program.
- Change the image's resolution to be 72 ppi.
- Crop the image to the correct dimensions
  - Small Photo/Rotator: 660 pixels by 371 pixels
  - Large Photo/Rotator: 1000 pixels by 371 pixels
- Save the image as a jpg using Save for Web for optimization.
  - Adjust the Quality slider and aim to reduce the image's file size while maintaining graphic quality.

1. Click the orange **MultiEdit** button at the top of the screen and do one of the following:

1a. For a large or small image, complete the form under "Feature Image".



1b. For a small video, enter in the video URL under "Feature Video".

1c. For a large or small rotator, complete the “Feature Rotator Settings” area on the form. Auto-rotation should be set as “No” for accessibilty compliance.

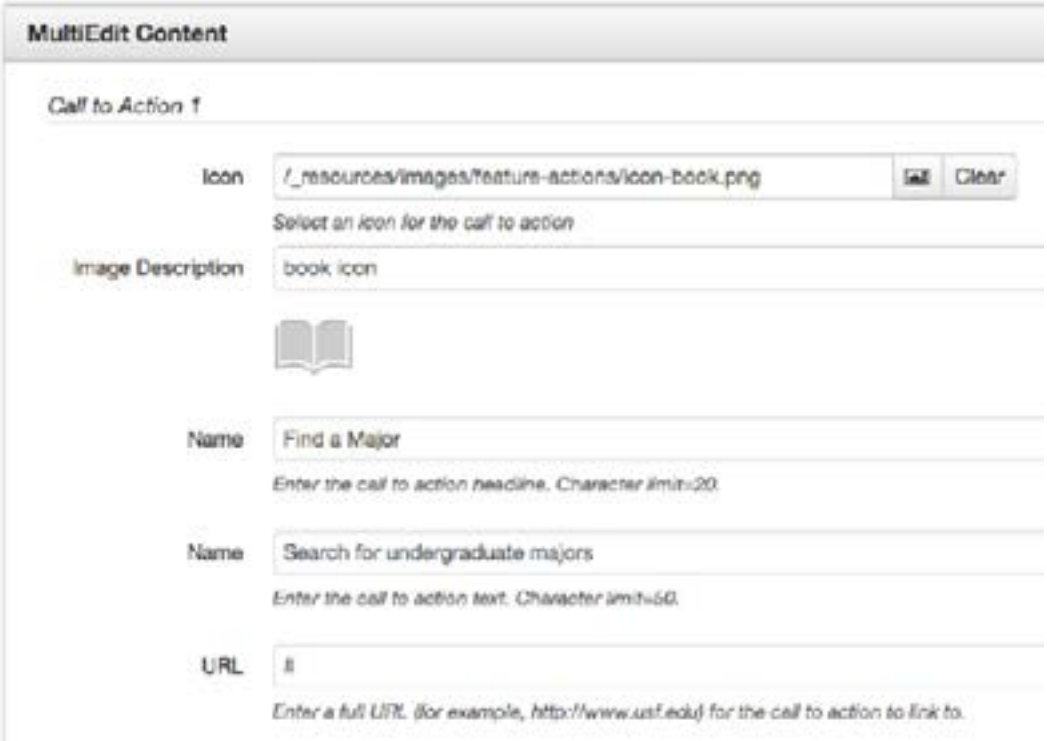
Then complete the form fields and upload images for each rotating item.

2. Click **Save**.
3. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

To change Call to Action Boxes

1. From the **top (Home)** directory, click the **widget** folder.
2. Click on your unit's folder and select your Call to Action widget (when creating a new Call to Action widget, please use "cta" in the filename along with the subject matter. For example, cta-find-your-major).
3. Click the orange **MultiEdit** button at the top of the screen.

4. Complete/Edit the form fields and choose the icon for each item (you must have four items in order to use the Call to Action option).



5. Click **Save**.
6. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

A list of icons currently available is located in Section 5 of this guide. To request a new Call to Action icon to be created, please contact your liaison.

To change Text Navigation

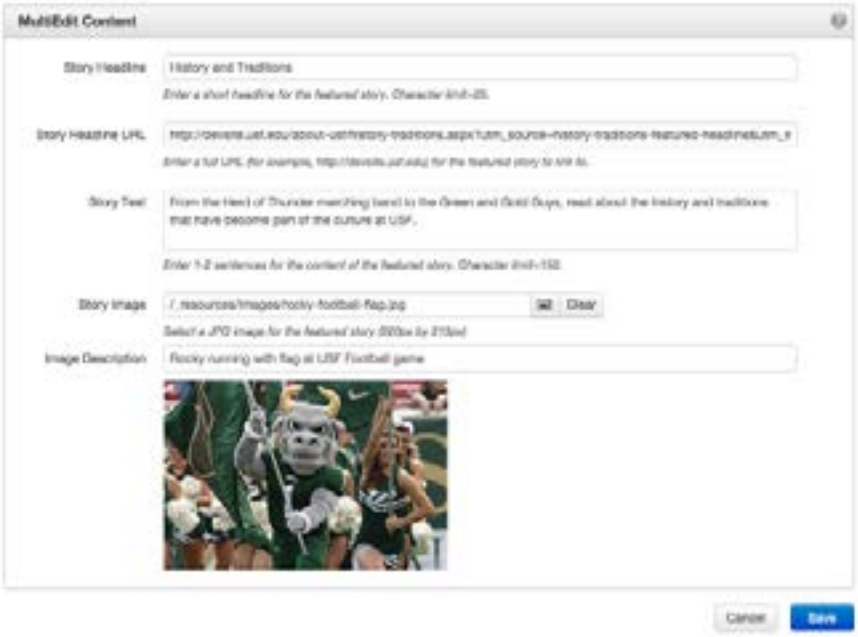
1. From the **top (Home)** directory, click the **widget** folder.
2. Click on your unit's folder and select your Text Navigation widget (when creating a new Text Navigation widget, please use "text-navigation" in the filename.
3. Click the orange **MultiEdit** button at the top of the screen.

4. Complete the Text Navigation portion of the form.

5. Click **Save**.
6. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

To change an existing Widget

1. From the **top (Home)** directory, click the **widget** folder.
2. Click on your unit's folder.
3. Check out the widget that you want to edit.
4. Select the Multi Edit button.
5. Make all appropriate changes.
6. Click **Save.**



7. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

To select a Widget to use on your homepage

1. Click the Properties button in the page options at the top of the homepage (index.pcf file).

2. Click the document icon, navigate to and click on the widget you wish to use. You may also enter in the path manually. Widgets need to be created and published prior to selecting them here.

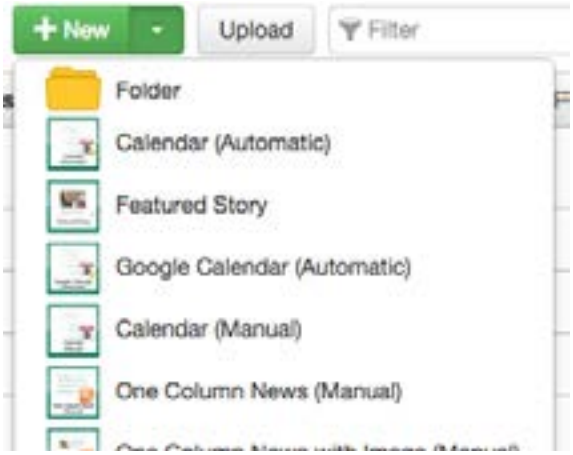
3. Click **Save**.
4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

To create a new Widget

If your site has not gone live yet, please contact your CMS Liaison to create new widgets for you. Once your site has launched, follow these steps:

1. From the **top (Home)** directory, click the **widget** folder.
2. Click on your unit's folder.
3. Click either the **New button or the arrow**. Clicking the arrow will provide a quick look at which widgets are available, while clicking the New button will provide a larger view.

Quick View



Large View

4. Select the type of widget you want to create.
5. Complete all required information, following all instructions.
6. Click **Create**.
7. Click the **MultiEdit** button.
8. Make all appropriate changes.

9. Click **Save.**
10. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

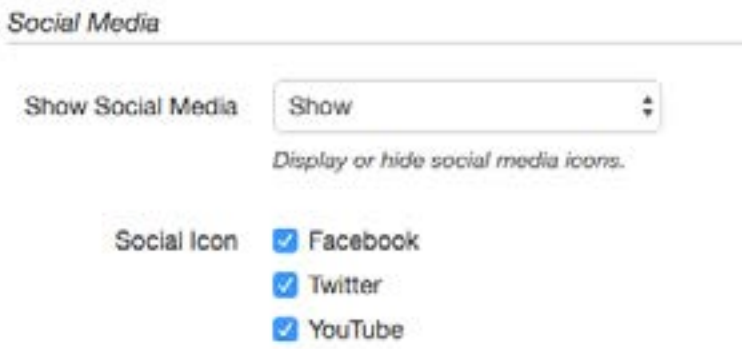
Social Media

To change existing networks and links

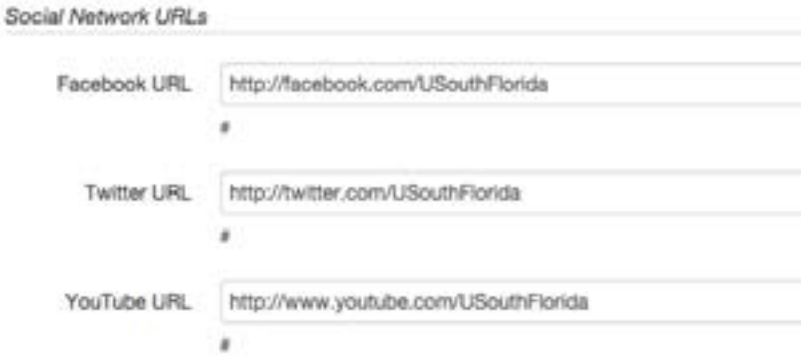
For sites created **PRIOR** to August 15, 2016

1. Click the Properties button in the page options at the top of the homepage (index.pcf file).

2. Under the "Social Media" section, select/deselect the social networks you wish to include/remove.



3. Enter in corresponding URLs in "Social Network URLs" section.

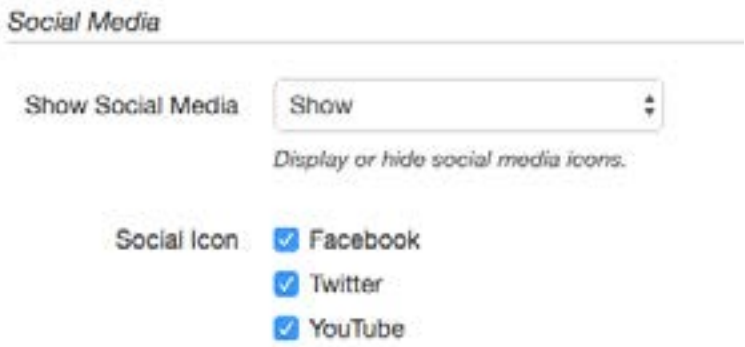


4. You can also Show or Hide the Social Media icons from this screen. Simply select Show or Hide from "Show Social Media" drop down menu.
5. Click **Save**.
6. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

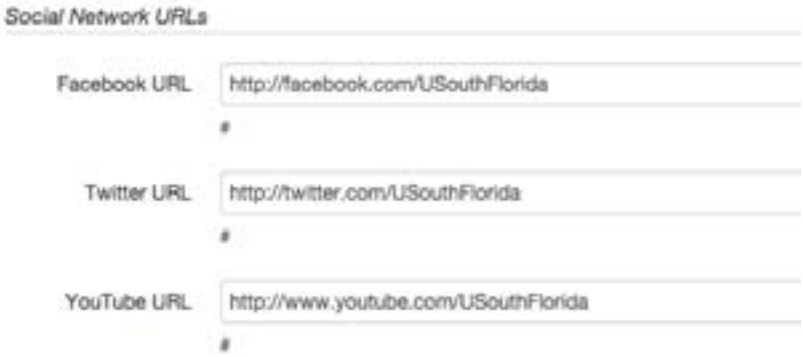
For sites created **AFTER** August 15, 2016

1. Navigate to your homepage directory and select the "_props.pcf" file. Click on the "Properties" button in the page options at the top of the page.

2. Under the "Social Media" section, select/deselect the social networks you wish to include/remove.



3. Enter in corresponding URLs in "Social Network URLs" section.



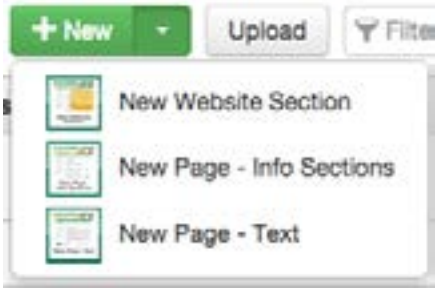
4. You can also Show or Hide the Social Media icons from this screen. Simply select Show or Hide from "Show Social Media" drop down menu.
5. Click **Save**.
6. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Secondary Pages

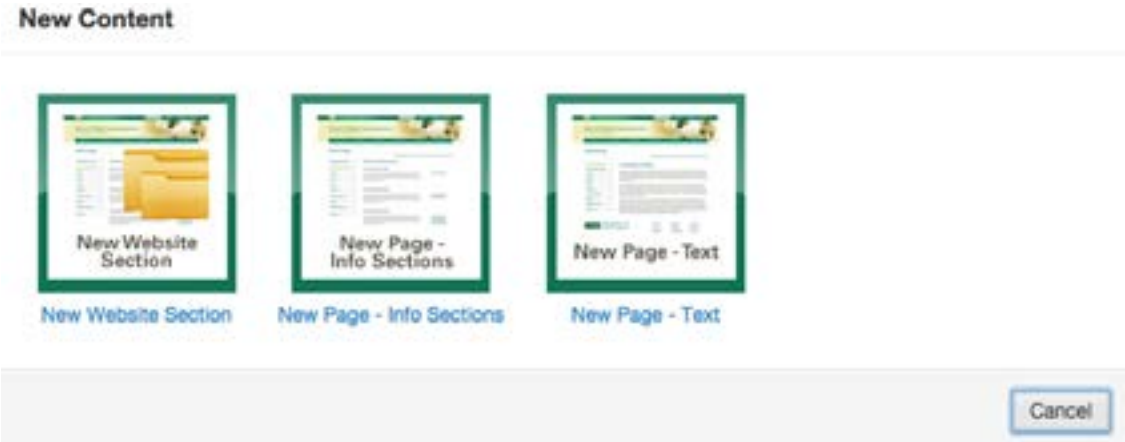
The system is configured with templates, which are utilized to create new sections and pages. These templates allow for the pages to be configured uniformly and have a consistent look and feel. The available templates will depend upon the structure created by the administrators.

To create a new section or page, click either the **New button or the arrow**. Clicking the arrow will provide a quick look at which templates are available, while clicking the New button will provide a larger view.

Quick View



Large View



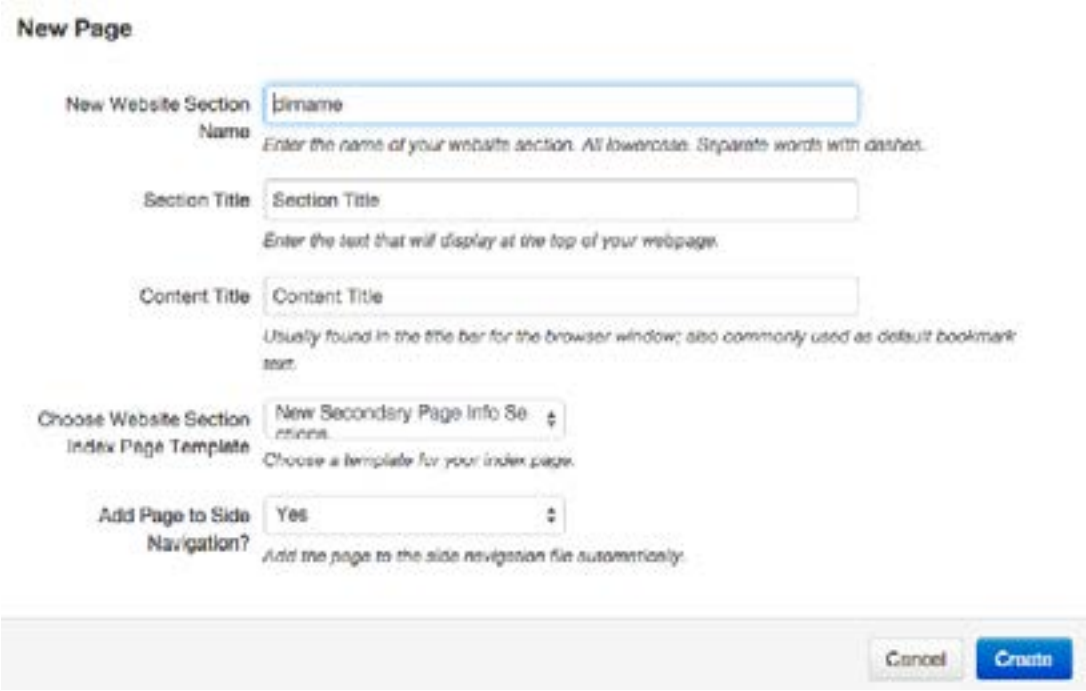
The section template(s) will contain all of the necessary files to make the pages within the new directory render correctly.

Each selection will present its own properties, which must be completed in order for the page or directory to be configured. Complete the requested information.

Important Note: Remember to keep the extension of .pcf when naming files. If this extension is changed, the page will not render properly. Header, footer, and styles will not be available.

Creating a New Website Section

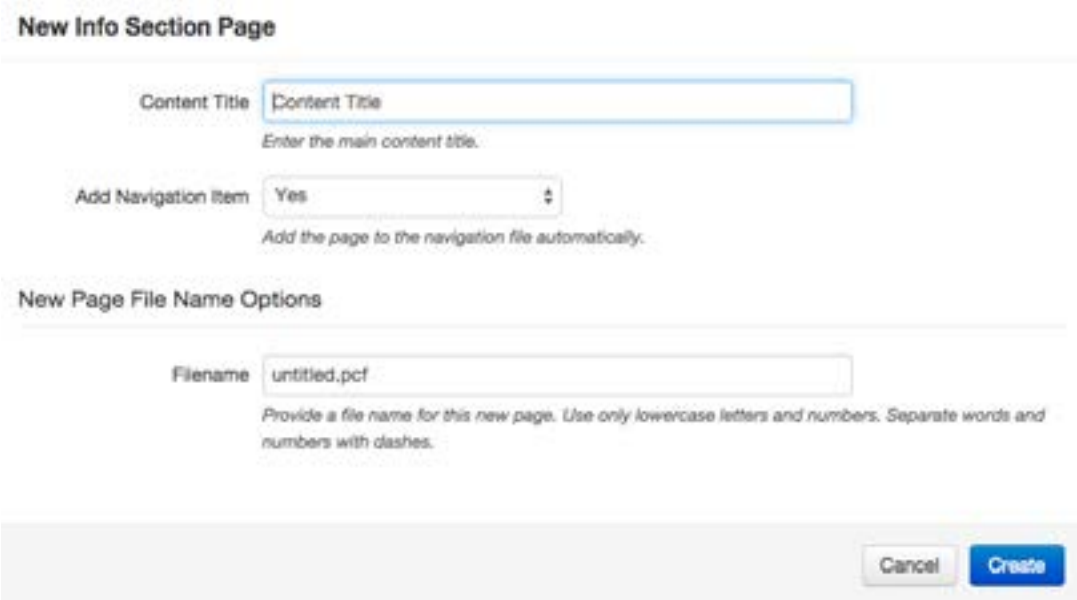
1. Navigate to the directory that you would like to add a New Website Section to.
2. Click either the **New button or the arrow**.
3. Choose **New Website Section**.
4. Enter New Website Section Name. This will be the section that contains all of your secondary pages and will have its own side navigation. For example, on the main USF website, About USF is considered the "website section", WebTools is the secondary page that lives in that section. Name your website section using all lowercase and separate words with dashes (i.e. about-usf). Remember, this text also becomes part of your URL.
5. Enter Section Title. This is the text that will display at the top of all the pages within this section and will automatically be used in the breadcrumbs.
6. Choose which page template you want to use for this page. You can select either an info section page or a text page.
7. Choose whether you want the new page to appear in the side navigation.
8. Click **Create**.



Creating New Secondary Pages

New Page – Info Sections

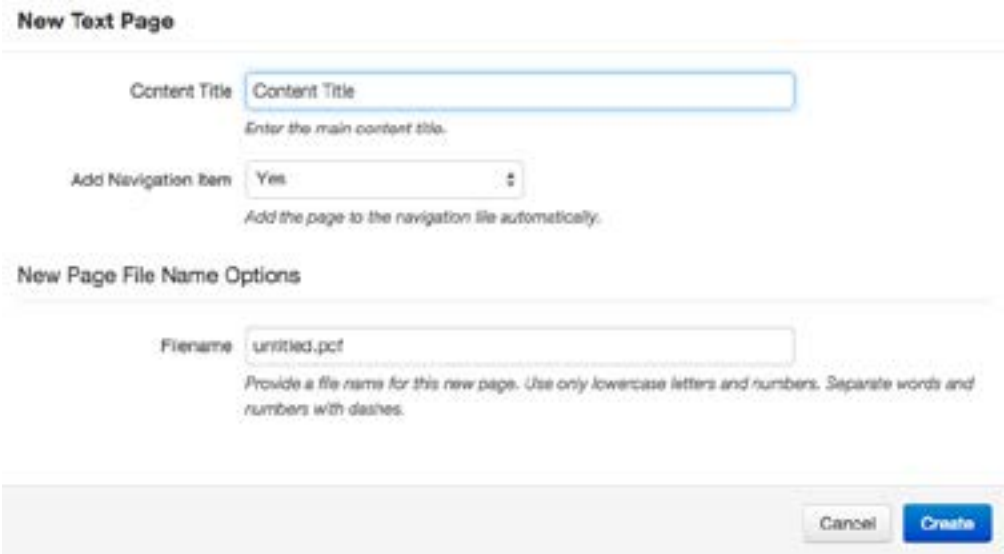
1. Navigate to the folder in which you want the page to appear.
2. Click either the **New button or the arrow**. Clicking the arrow will provide a quick look at which templates are available, while clicking the New button will provide a larger view.
3. Click **New Page – Info Sections**.
4. Enter Content Title. This is the text that will appear at the top of your page.
5. Choose whether you want the new page to appear in the side navigation.
6. Enter the file name. Make sure you keep the .pcf at the end. Follow all formatting instructions on naming. Remember, this text also becomes part of your URL.



7. Click **Create**.

New Page - Text

1. Navigate to the folder in which you want the page to appear.
2. Click either the **New button or the arrow**. Clicking the arrow will provide a quick look at which widgets are available, while clicking the New button will provide a larger view.
3. Click **New Page – Text**.
4. Enter Content Title. This is the text that will appear at the top of your page.
5. Choose whether you want the new page to appear in the side navigation.
6. Enter the file name. Make sure you keep the .pcf at the end. Follow all formatting instructions on naming. Remember, this text also becomes part of your URL.



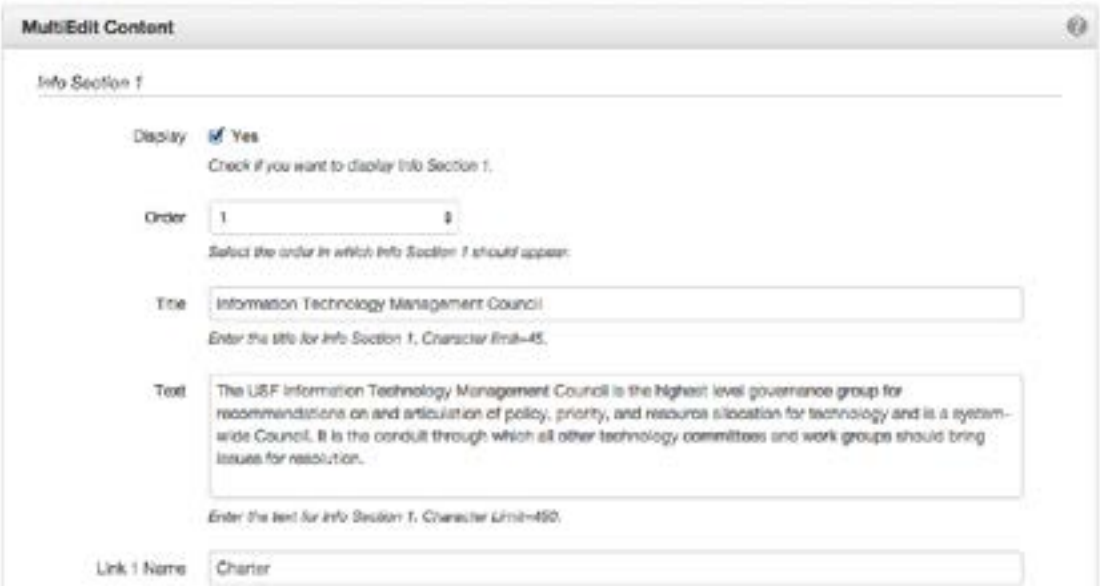
7. Click **Create**.

Editing Info Section Page

If your page is an "Info Section" page, a WYSIWYG Editor is not available. To edit these types of pages:

1. Click the orange **MultiEdit** button that appears at the very top of the page.

2. Make desired edits, following all formatting guidelines in gray text underneath each field. You can also change the order and show/hide each section here.



3. Click **Save**.
4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

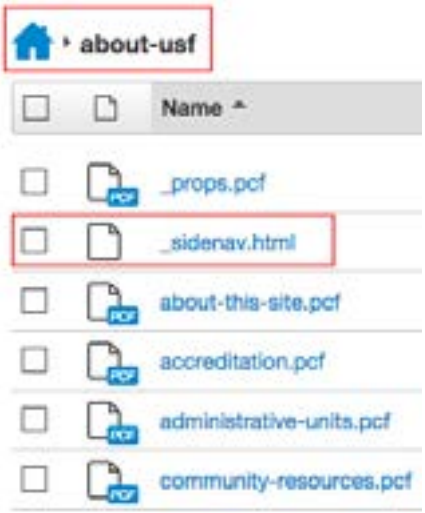
Editing Text Page

1. Click **Edit** button above the area you wish to change.

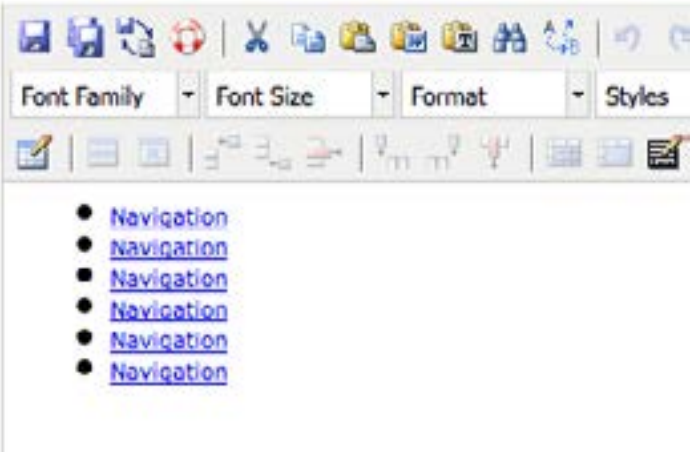
2. Make desired edits within the WYSIWYG Editor (for more details about the editor, refer to the "WYSIWYG Editor" section of this manual).
3. Click **Save** icon in WYSIWYG Editor.
4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Editing Side Navigation

1. Within the folder of the section you want to edit, check out "_sidenav.html".



2. Edit navigation text and hyperlinks in WYSIWYG Editor. You can also change the order of the navigation items here. Be very careful when editing these links because the formatting can be lost when making changes.

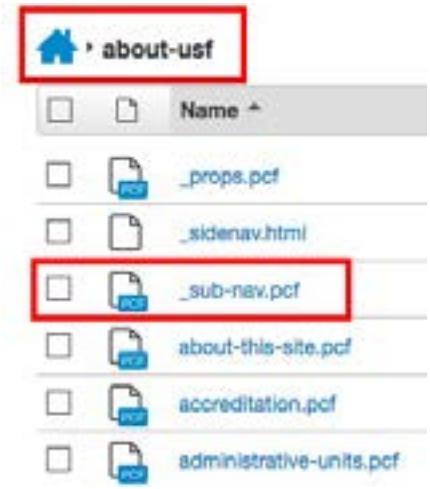


3. Click **Save** icon in WYSIWYG Editor.
4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Editing Sub Navigation (Drop Down Menu)

For sites created **AFTER** August 15, 2016 (for sites created BEFORE August 15, 2016, please contact your CMS liaison to enable the sub navigation file).

1. Within the folder of the section you want to edit, check out "_sub-nav.pcf". Then click on Properties. This will bring up a MultiEdit form.



2. Select the number of items that you would like to display from the "Number of Links" drop down menu. There should be no more than 12 items. Complete the Link Text and Link URL fields for each item.

3. Click **Save**.
4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Snippets

Inserting a Callout Image on a Text Page

Prepare all images PRIOR to uploading in the USF CMS according to these specifications (if your image cannot be cropped to these exact sizes, then make sure they match the width measurement):

Callout – Large

- jpg file
- measure 720 pixels W x 405 pixels H
- 72 dpi
- when saving your photo from Photoshop, use “save for web” option

Callout – Medium

- jpg file
- measure 320 pixels W x 213 pixels H
- 72 dpi
- when saving your photo from Photoshop, use “save for web” option

Callout – Small

- jpg file
- measure 100 pixels W x 100 pixels H
- 72 dpi
- when saving your photo from Photoshop, use “save for web” option

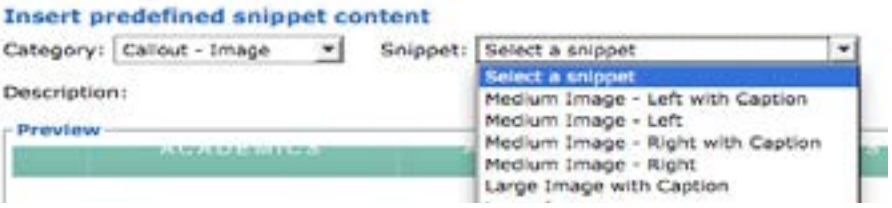
To insert an image:

Use the return/enter key to create a new paragraph where you would like the image to be located.

1. Click on the Snippet icon in the WYSIWYG toolbar.

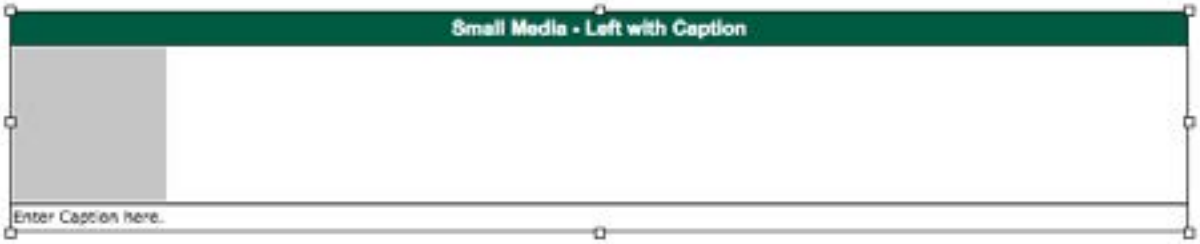
2. Select “Callout – Image” from the category dropdown.

3. Select the appropriate callout from the snippet dropdown.



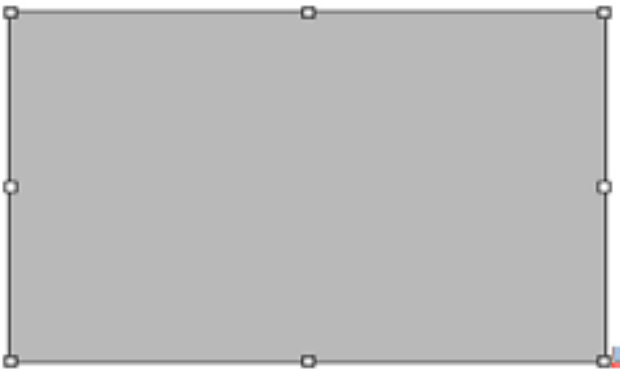
Selecting a callout with a caption will allow you to edit text that appears beneath the callout image. This text will display in a pre-determined style once the page has been published and cannot be changed in the WYSIWYG editor. "Right" and "Left" indicate the placement of the callout in the text. Please do not try to move or manipulate the caption as the CMS will automatically style it when saved.

4. Click **Insert**.

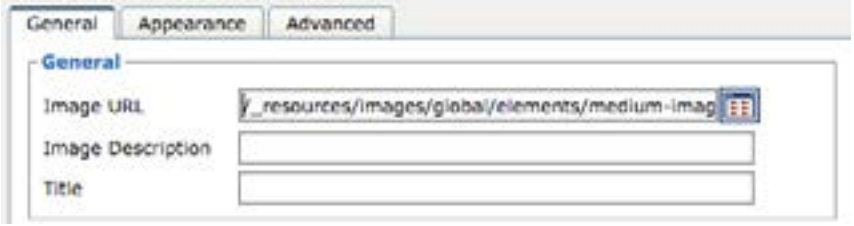


Note: The callout will appear in a table within the WYSIWYG Editor. This is for ease of editing and the table will not appear on your site. Please do not try to move or manipulate the table as the CMS will apply the correct styles when saved.

5. Click on the gray placeholder image within the table to replace it with your own photo (white boxes will appear around the image once it has been selected).



6. Click the Image icon in the WYSIWYG Editor.
7. Select the location of your image. Once your image is selected, fill out description text for the image. This description is required for accessibility compliance.



8. Click **Update**.

If you have selected a callout image with a caption, then edit that text as needed.

9. Click **Save** icon in WYSIWYG Editor.
10. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

To remove a callout image from the page:

1. Right click inside the table.
2. Select the "Delete Table" option from the menu.

Inserting an Image Grid on a Text Page

Prepare all images PRIOR to uploading in the USF CMS according to these specifications if you would like the image to fill the maximum space (the width is required, the height should scale proportionally).

Two-column Grid
- jpg file
- measure 355 pixels wide
- 72 dpi
- when saving your photo from Photoshop, use “save for web” option

Three-column Grid (Default)
- jpg file
- measure 230 pixels wide
- 72 dpi
- when saving your photo from Photoshop, use “save for web” option

Four-column Grid
- jpg file
- measure 170 pixels wide
- 72 dpi
- when saving your photo from Photoshop, use “save for web” option

To insert an image grid (deviation from these instructions may break the responsive design of the templates)**:**

1. Place the cursor within the WYSIWYG on an empty line where the grid should go.
2. Click the Snippet icon in the toolbar.

3. Select “Media” from the Category drop down menu. Then select “Image Grid” from the Snippet drop down menu.

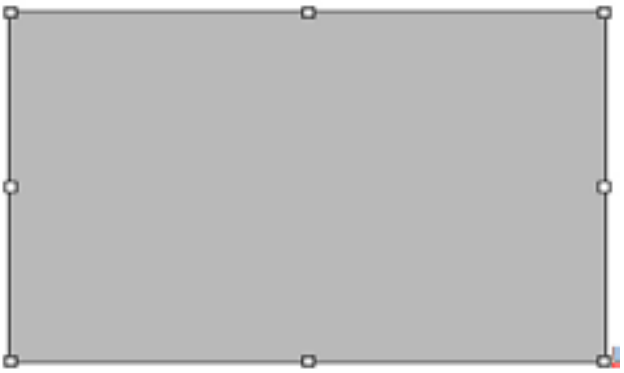
4. Click **Insert**.

Number of Images in Row Options: 2, 3, or 4	3
Image	Caption
	Caption Goes Here
	Caption Goes Here

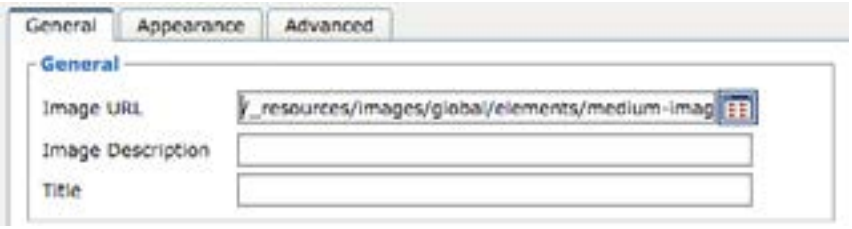
Note: The image grid will appear in a table within the WYSIWYG Editor. This is for ease of editing and the table will not appear on your site. Please do not try to move or manipulate the table as the CMS will apply the correct styles when saved.

5. Indicate how many images you would to display within a row, the options being 2, 3, or 4. The CMS will automatically create additional rows of images on your published page if the number of images you add exceeds the "images per row" that you've chosen (for example, if you choose 3 images per row, and add 4 images to the snippet, your published page will show one row of 3 images, and a second row with 1 image). To add additional images, right-click within the table and select "Insert Row After." You'll only need to use one single image grid snippet.

6. Click on the gray placeholder image within the table to replace it with your own photo (white boxes will appear around the image once it has been selected).



7. Click the Image icon in the WYSIWYG Editor.
8. Select the location of your image. Once your image is selected, fill out description text for the image. This description is required for accessibility compliance.



9. Click **Update**.
10. Edit captions, if applicable. You may delete the filler text if captions are not needed.
11. Click **Save** icon in WYSIWYG Editor.
12. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

To remove an image from the page:

1. Right click inside the table.
2. Select "Delete Row" option from the menu.

To remove an image grid from the page:

1. Right click inside the table.
2. Select the "Delete Table" option from the menu.

Inserting a Table on a Text Page

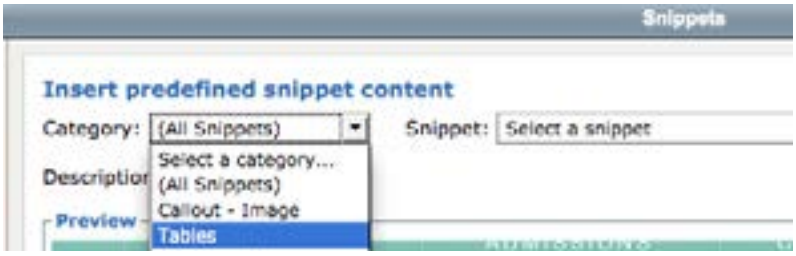
Please follow each of these steps for creating tables in the CMS. Deviation from these instructions may break the responsive design of the templates.

1. Open up the WYSIWYG for the page you want to add a table to.
2. Place the cursor within the WYSIWYG on an empty line where the table should go.

Note: Make sure to have an extra space underneath your table before inserting. Otherwise, you won't be able to add any text underneath it if you need to.

3. Click the Snippet icon in the toolbar.

4. Select "Tables" from the Category drop down menu.



Then select the type of table you would like to use (previews of the styles can be found on the next page).

- Bordered and Striped
- Bordered
- Striped
- Default (Lined)

5. Click **Insert**. Your table will appear with filler text in it. You many edit that text and add rows or columns as needed.

Note: The table may not appear correctly while looking at it in the WYSIWYG Editor. Please do not try to manipulate it as the CMS will automatically style it when saved and published.

6. Click **Save** icon in WYSIWYG Editor.
7. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Table Styling Options:

Bordered and Striped

Heading 1	Heading 2	Heading 3
Item 1	Item 2	Item 3
Item 1b	Item 2b	Item 3b

Bordered

Heading 1	Heading 2	Heading 3
Item 1	Item 2	Item 3
Item 1b	Item 2b	Item 3b

Striped

Heading 1	Heading 2	Heading 3
Item 1	Item 2	Item 3
Item 1b	Item 2b	Item 3b

Default (Lined)

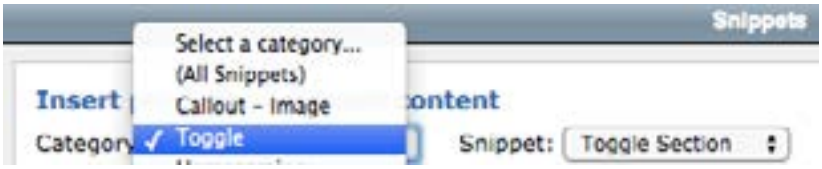
Heading 1	Heading 2	Heading 3
Item 1	Item 2	Item 3
Item 1b	Item 2b	Item 3b

Inserting a Toggle Section on a Text Page

Toggles can be used to hide a piece of content until a line of text is clicked. Please follow each of these steps for adding toggle sections. Deviation from these instructions may break the responsive design of the templates.

1. Place the cursor within the WYSIWYG on an empty line where the section should go.
2. Click the **Snippet** icon in the toolbar.

3. Select "Toggle" from the Category drop down menu. Then select "Toggle Section" from the Snippet drop down menu.



4. Click **Insert**.

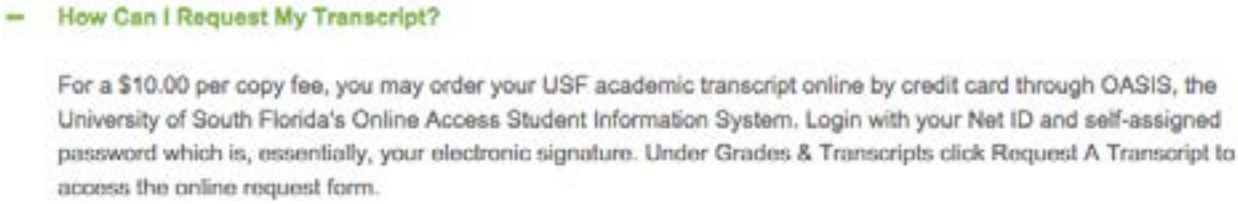
Note: The toggle section will appear in a table within the WYSIWYG Editor. This is for ease of editing and the table will not appear on your site. Please do not try to move or manipulate the table as the CMS will apply the correct styles when saved.

5. Enter the toggle text and the toggle content. The text is the main headline or question. The content is the text that appears when the section is expanded.
6. Repeat steps 2 - 5 for as many sections as are needed. Then click **Save** icon in WYSIWYG Editor.

On the preview screen, you will see the toggle text with a plus sign. Once that text is clicked, the symbol will change to a minus sign and the expanded text will appear underneath.

Closed

Expanded

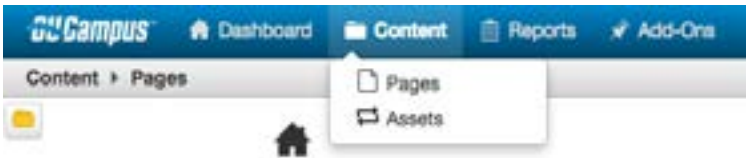


7. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

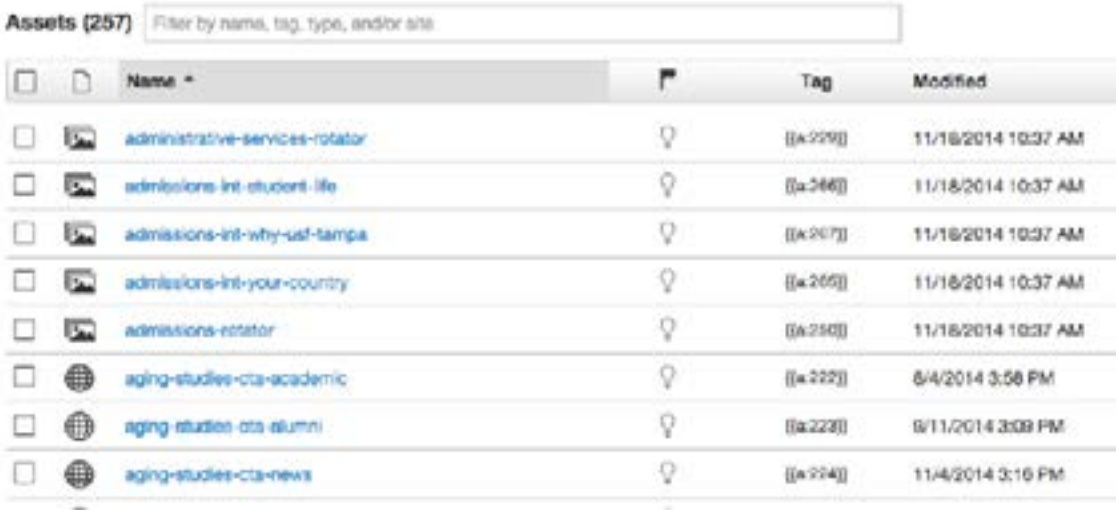
Asset Manager

Access to create new assets varies depending on permission level.

Navigate to Asset Manager by going to **Content > Assets**.



This will provide a list of the current assets, which can be modified if access has been granted, and the ability to create a new asset, also based on permissions.



Asset Creation

Two types of Assets can be created.

- **Web Content** –The asset is configured with a mini-WYSIWYG Editor. It may include basic formatting.
- **Plain Text** –The asset is configured with plain text only.

To create a new asset:

1. Click either the **New button or the arrow**. Clicking the arrow will provide a quick look at which widgets are available, while clicking the New button will provide a larger view.
2. Select the asset type desired.
3. Complete the presented fields, including:
   - Asset Name*
   - Description
   - Tags (unit name and type of asset)

**Please note: When naming your assets, please use this configuration: unit name-type of asset-name of asset (i.e. main-usf-text-history; business-text-mba)*

4. Configure the asset.
5. Select the group to whom access to edit the asset should be granted.
6. Click **Create**.
7. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Before the asset can be used on the pages, it will need to be published. Follow the same publication process as with pages (see Publishing Pages section).

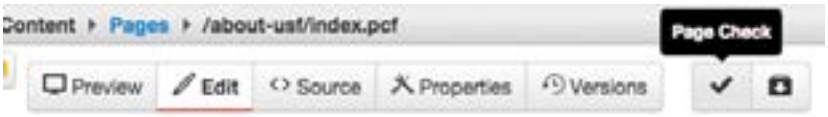
Helpful Hint: If tagged properly, you can filter the main list of assets by your unit name. Simply enter in your unit name in the filter bar. This enables you to view only your assets.

Before You Publish

Page Check is an optional feature that allows users to check a page's spelling, links, and compliance with accessibility standards prior to sending for review, approval, or publishing. It is possible that none, all, or some of these features will be available.

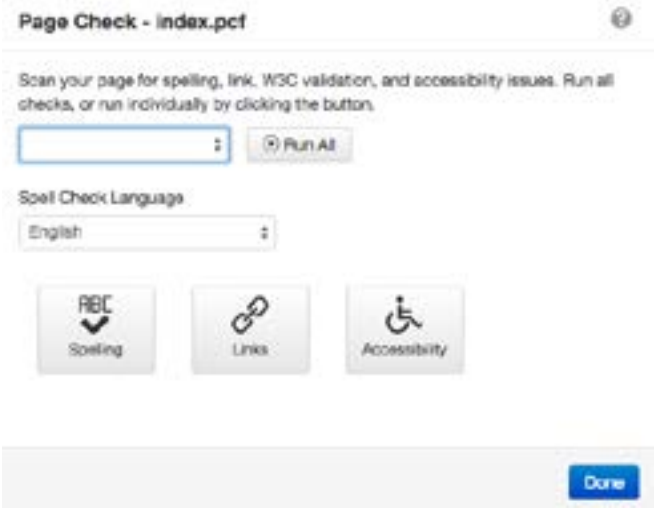
To utilize the Page Check option, either select the it from the "Review" drop down menu for the file on the pages view,

or the check icon at the top of the page.

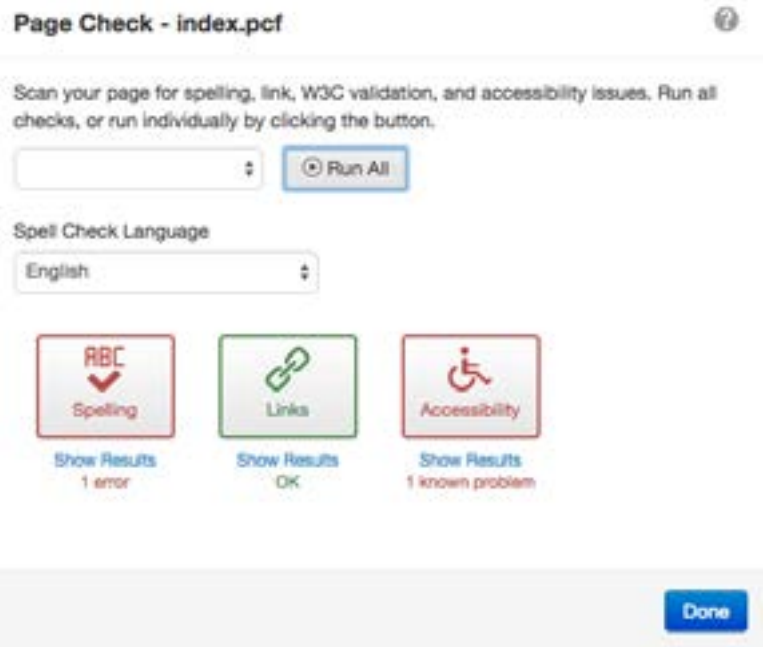


This opens a box with different options.

Click the button corresponding to the option(s) desired in order to run the check(s). For the "Spelling" option, select the language for which the page should be checked.



After the check has been run, the results will appear under each option. If there are errors or warnings, they can be viewed by clicking on the "Show Results" link.



Before sending to another user for review or approval, or publishing the page, it is advised to fix the identified errors.

If using “Accessibility Check,” the “Known” errors will include solutions. Any identified “Likely” or “Potential” errors will require the user to review the error and decide if the error is truly an error and what the best course of action is to fix it.

Keep in mind that errors that may be identified in all three options may include errors that are in areas that cannot be edited by the user. For instance, if the error is in the header, this is generally only editable by an administrator. In those cases, the user should pass the identified error on to their CMS Liaison to review it. Script errors are typically controlled by the vendor and cannot be updated.

The page check options available will also be available during Publish.

Publishing Pages

Once a page has been edited, it can either be sent to another user for approval, or it can be published directly to the site.

Note: prior to your site going live for the first time, all pages/changes, etc. will be published to the test site by default. Once your site has launched, you will have the option of publishing to either the test site or the live site.

The ability to publish pages is based on permissions.

To access the publish options from the folder structure, click on the "Publish" drop down menu under the Options column.

Publish Now

A "Publish" button will appear at the top of the page.

To publish the page, simply click on this button. After completing the elements described below, click the "Publish" button that appears at the bottom of the publishing screen.

Clicking the "Publish" button will bring up a publish screen. Within this screen the following tools may be found:

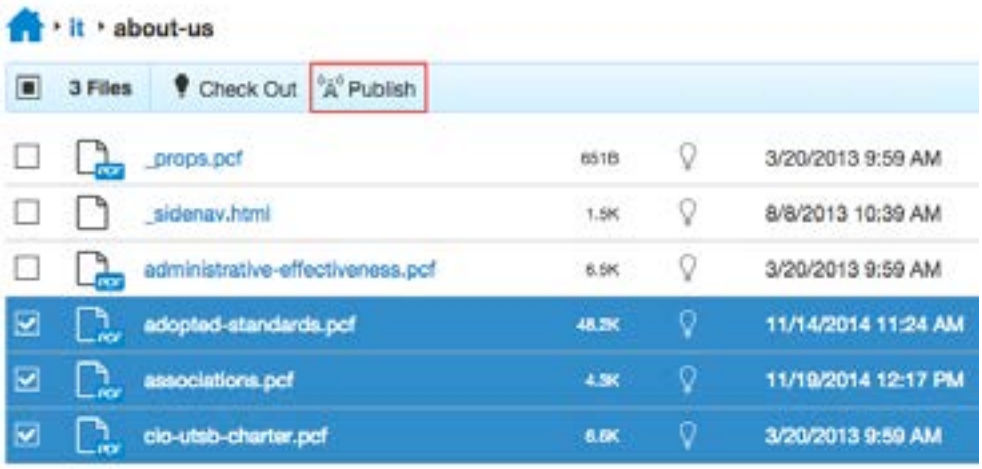
- **Final Check** – This allows a final spell check, link check, and page validation to be completed before publishing the page. The available tools will vary based on the administrator settings. Simply click on the button(s) for the type of check you would like to run.
- **Publish Target** – This provides the option to publish to the live (production) site or the test site. **This menu only appears after your site has been launched.** Prior to that, all pages are automatically published to your test site.
- **Version Description** – This will allow a version description to be included in order to indicate what was updated and why the page is being published. This can be used when choosing previous versions in which to revert.
- **Publish button**

Once the publish is complete, the system will present a success message, which includes a link to view the published page in a new window.

It is also possible to publish multiple pages within a directory simultaneously. Keep in mind that doing this does not allow for:

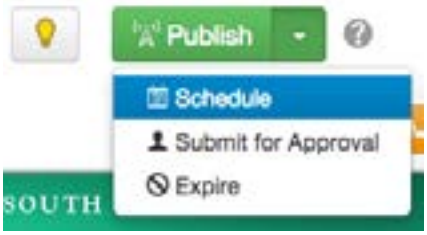
- Final Check
- Version Description(s)

From within the folder structure, simply check the boxes next to the page(s) to be published, and click “Publish” found at the top of the screen. Keep in mind that the system will only allow pages to be published that do not require approval and are not checked out to another user. If a warning is displayed, simply uncheck the page(s) indicated in the warning, and click “Publish” again.



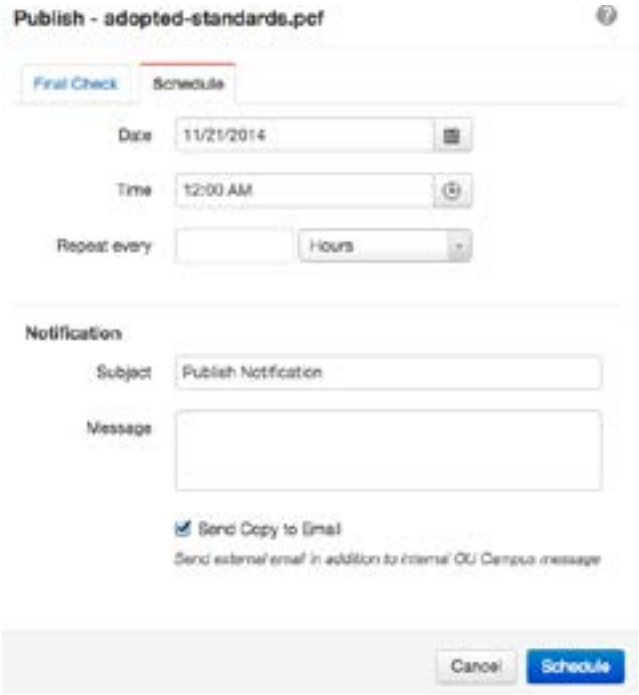
Schedule

When users want to publish content, but wish to do so at a later date, they can utilize the Scheduled Publish tool. A scheduled publish can only be canceled or modified by the user who set the schedule or an administrator. “Schedule” is part of the Publish dialog.



Clicking “Schedule” will bring up a screen in which the scheduling can be completed.

1. Select the date.
2. Select the time.
3. Indicate whether or not the publish should repeat.
4. Create an optional email message to be sent upon completion of the publish to the Dashboard.
   - Keeping the checkbox next to “Send Copy to Email” checked will send the completed publish message to your usf.edu email address as well as within the USF CMS. If this is unchecked, the message will be sent through the USF CMS only.
5. Click **Schedule**.

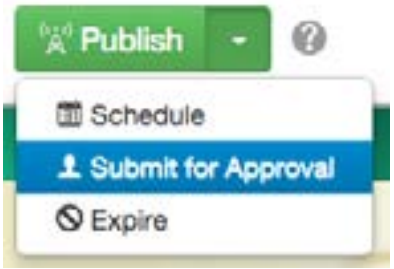


Submit for Approval

If an approval workflow is in place, and users, content areas, or a content type have had an approver assigned, then a user may have to send the content for approval rather than being able to publish directly. A "Submit" button will appear if workflow is in place. Content must be checked out before it can be submitted for approval.

Clicking the Submit button will send it to the approver automatically.

Content Managers also have this functionality available as an option and may choose to use the "Submit for Approval" feature to send the content to another user.



When "Submit for Approval" is clicked, a mail window will appear. Sending the page to a user will transfer the checked out status from the current editor to the person to whom the page is sent.

1. Select the user from the drop-down next to the **To** field. If an approver has been enforced, the **To** field is auto-populated, and there will not be a drop-down available.
2. Fill out the necessary text fields.
3. Enter a Message to the user to whom the message is being sent providing any necessary information.
4. The checkbox next to "Send Copy to Email" allows the request for review to be sent to the user's external email address as included in the user settings. This allows the user to receive an indication that action is to be completed without having to log into the USF CMS. Unchecking this option will only send the message through the USF CMS system.
5. Click **Submit**.

Reviewing a Page Sent for Approval

If a page was sent to a user for review, once received, the page can be opened directly from your Workflow.

The options made available may include:

- Publish
- Schedule
- Reassign
- Expire
- Decline

Certain options may not be available based on permissions.

Comparing Changes

Before determining whether the page should be published, scheduled, or the publication request should be declined, a comparison of the page's current configuration to that of a previous version, including the currently live version, can be completed using the "Compare" feature.

The "Compare" feature is found in the Versions section of a page. Compare allows a user or reviewer (e.g., an approver) to easily identify changes that have been made to a given page by comparing the newly proposed page with either the page currently live (the last published version of the page), to any prior published versions.

When using "Compare," the system provides visual indication of changes that have been made between the versions in order to determine if the updates are appropriate and ready to be published.

1. Click **Versions**
2. Click the **Compare** button.
3. Select the version to which to compare the current version.

Changes are indicated by:

- Deletions: red with a strikethrough
- Additions: green with an underline
- Style changes: blue with a squiggly line (page view only)

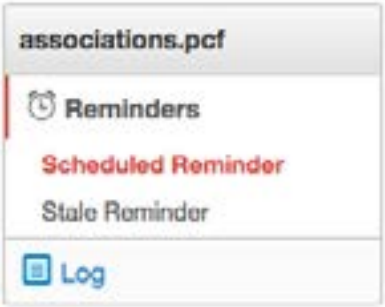
Setting Reminders

Reminders can be set on any page to which the user has been granted access by an administrator, even if the page is currently checked out to another user. Multiple individuals can set a reminder on the same page, and both types of reminder options can be set for one individual.

Reminders are available from the Pages list view and the Pages actions view (Properties > Reminders) and both reminder types can be associated with the same page at one time.

Pages View

Properties View



1. **Scheduled Reminder** – Used to define a particular date and time on which the reminder message should be sent and can be set as repeating.
2. **Stale Reminder** – Used to schedule a reminder to be sent if the page is not updated within a defined period of time.

Scheduled Reminder

A scheduled reminder is used when there is a specific time period or date when the reminder message must be sent. An example of when a scheduled reminder is appropriate is a tuition page. If the tuition is updated on a yearly schedule, a reminder may be set for a week prior to the tuition change and set to repeat on a yearly basis.

To set the reminder, simply:

1. Navigate to the Reminders area by one of the two access points noted above.
2. Select the checkbox next to **Set Scheduled Reminder.**
3. Select the date for the reminder to begin. Click inside the date field or on the calendar icon for a date picker from which the date may be selected. The date may also be entered manually.

4. Select the time as necessary by clicking inside the time field or entering manually.
5. If the reminder should recur, enter the numeric interval and select the period of time for Repeat Every. Period options include: Days, Weeks, Months, Years.
6. An internal and external notification is sent by default, and optionally, the details can be changed in the Notification section. Select the group to whom the notification should be sent or select Myself. The default settings are used, if no changes are made.
7. Enter in the Subject and Message to be sent.
8. Leave "Send Copy to Email" checked so that the message will be sent both internally within the USF CMS and to your usf.edu email address.
9. Click **Save**.

Stale Reminder

A stale reminder is triggered when a page has not been updated for a set amount of time. The notification reminder is sent in the form of an email. Simply select the time period and fill out an optional external notification email to be reminded when a page becomes stale. To set the reminder, simply:

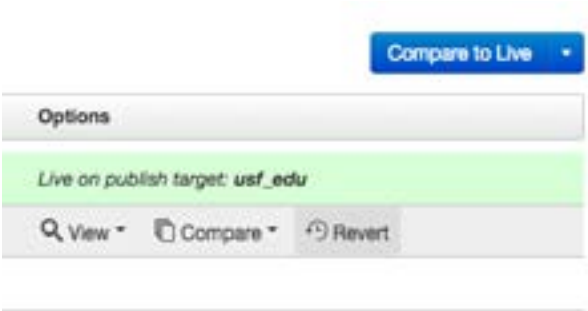
1. Follow steps 1 and 2 from setting a Scheduled Reminder.
2. Click the **Stale Reminder** tab.
3. Select the Set Stale Reminder checkbox. The Last Published date and time is displayed.
4. In "Stale After" field, enter the number and select the period of time to define the stale interval.
   Period options include: Days, Weeks, Months, Years
5. An internal and external notification is sent by default, and optionally, the details can be changed in the Notification section. Select the group to whom the notification should be sent or select Myself. The default settings are used, if no changes are made.
6. Enter in the Subject and Message to be sent.
7. Leave "Send Copy to Email" checked so that the message will be sent both internally within the USF CMS and to your usf.edu email address as well.
8. Click **Save**.

Keep in mind that it is possible to set both the "Scheduled Reminder" and "Stale Reminder" at the same time by simply checking the boxes in front of each and completing the necessary data.

Revert

To revert to a previous version of the page:

1. From the Versions screen, hover over the row for the version and click Revert.



2. The confirmation dialog is shown.
3. Click **Revert**.
4. A success message shows to which version the page was reverted.

Keep in mind that when a page is reverted, it is reverted only on the Staging Server. The page must be published in order for the changes to appear on the live site.

Section Five: Addendum

What is Search Engine Optimization (SEO)?

SEO is the method used to boost the ranking or frequency of a website in results returned by a search engine in an effort to maximize user traffic to the site.

So what does that mean exactly?

The Internet is the primary method of locating information for the vast majority of people. If they need answers, then they go straight to a search engine such as Google or Bing. With so many websites currently on the planet, it is ill-advised to take on the "if you build it, they will come" mentality when creating or revamping your website. In order to "boost" your site, it needs to accommodate those search engines by providing them information on who, what and where you are.

How do search engines work?

For the purposes of this guide, we'll keep it simple and leave the highly technical aspects out. Search engines basically have four roles:

- Crawling
- Building an index
- Calculating relevancy and rankings
- Serving results based upon those calculations

Through automated robots called "crawlers" or "spiders," search engines can reach the billions of web pages that exist. Once robots find these pages, they then parse the code and store what they need to be recalled when a search query is conducted.

How do I make my content SEO-friendly?

There are many things to consider, most of which will happen behind the scenes in the CMS and the templates that are already prepared for you. Your top priority is to make sure your content includes the keywords or phrases your audience is searching for.

To ensure that your site is SEO-friendly, follow these steps:

- First, list the most important words and / or phrases currently featured on each page of your website. The keywords will likely be different for each page.
- Next, put yourself in the mindset of your audience. What would they be searching for to find the content that you are providing? List those words and/or phrases.
- Next, compare the two lists. Do they align? If not, you will need to modify your content so that it includes more of the keywords your audience is searching for.

Are there other ways to make my website SEO-friendly?

Yes. You can use the CMS to enter title tags and meta descriptions for each page you create, making it easier for search engines—and your audience—to find your content.

What are page titles?

A page title, also known as a title tag, is the word or phrase that appears in the tab in an Internet browser, at the top of an Internet browser window, and on an Internet search result page.

You can use the USF CMS to enter a page title for each web page you create. Here are a few tips for creating meaningful page titles:

1. Page titles should be concise. Avoid long titles, which are likely to get truncated when they show up in the search results. Limit your page titles to no more than 70 characters.
2. Brand your titles, but concisely. Consider including just your site name at the beginning of each page title, separated from the rest of the title with a delimiter such as a hyphen (-), colon (:), or
   pipe (|). Try to use "University of South Florida" or "USF" in your titles when possible.
3. Page titles should be distinct and descriptive. Avoid vague descriptors, such as "Home" for your homepage. Instead, select a distinct, descriptive title for each page on your site without duplication.

Examples of homepage page titles:

- Career Services | University of South Florida
- Partner With USF | University of South Florida
- University Communications and Marketing | University of South Florida
- Welcome to the University of South Florida | Tampa, FL

Try to match your secondary pages to the content title that you have chosen.

Examples of secondary page titles:

- Cost to Attend | University of South Florida
- Job Search | USF Career Services
- Social Media | University Communications and Marketing | USF
- Schools and Departments | USF College of Business

Do NOT have the same words or phrases appear multiple times.

Example: College of Engineering | engineering | ENGINEERING

What are meta descriptions?

A meta description is the text that can appear below the page title in the search result page. Meta descriptions are a good way to provide a concise, human-readable summary of each page's content. It's important to create a meta description for every page on your website.

You can use the USF CMS to enter a meta description for each page. Here are a few tips for creating meaningful meta descriptions:

Meta descriptions should be distinct and descriptive. Create descriptions that accurately describe the specific content featured on that page. Do not duplicate meta descriptions across multiple pages.

Meta descriptions should be concise. Limit them to 160 characters and do not include quotation marks.

The meta description doesn't need to be in sentence format. You can also include structured data featured on the page.

Example:

How do I add all of this information?

You have the ability to add page titles, meta descriptions and keywords as you build each individual page within the USF CMS. To learn more, review the Technical Manual.

What is a 301 redirect?

When you migrate your website into the USF CMS, you'll notice that many of your web page URLs will change. Content that used to be found on a page with a specific URL (example: it.usf.edu) will now exist on a page with a totally new URL (example: usf.edu/it). This situation results in broken links that create frustration for your website visitors.

This problem can be mitigated by redirecting URLs. Redirection is the process of forwarding one URL to a different URL. For example, if someone types in it.usf.edu into their web browser, then they will automatically be taken to usf.edu/it instead once a redirect is implemented.

There are multiple redirects that can be used. In most instances, the 301 redirect is the best method and is preferable for both users and search engines. A 301 redirect indicates to both visitors and search engine crawlers that the page has moved permanently. Think of it as a virtual version of forwarding your mail through the post office.

Redirecting requires IT assistance and cannot be done by a content manager or content contributor.

Will IT redirect all of my old URLs?

Unfortunately, IT cannot redirect every single page of every single website on campus; there are millions of pages! But we can cut down on the number of broken links. You have two options.

Option One

We can redirect your old website (every single page) to either the homepage of your new website, or to a site map page on your new website. This way, site visitors who try to visit one of your old URLs will be redirected to a page that helps them quickly navigate to the information they need.

To choose to send all redirects to your homepage, simply inform your CMS liaison, who will ask IT to set this up for you when they build your directory.

To choose to send all redirects to a custom site map on your new website, inform your CMS liaison, who will ask IT to include a site map page when they build your directory, and will provide guidance about how to set up your site map page.

Option Two

Departments that have a technical resource available are welcome to maintain a redirect index within the current (pre-CMS) web environment. IT Web Services (webservices@usf.edu) can assist your resource with implementing the best method for accomplishing the task. With this option, the department is responsible for maintaining the redirect index at all times.

What is accessibility?

It is important for people with disabilities to be able to navigate and interact with your site. Web accessibility encompasses all disabilities that affect access to the web, including visual and auditory.

Why is accessibility important?

The web is an increasingly important resource in many aspects of life. It is essential that the web be accessible in order to provide equal access and equal opportunity to people with disabilities.

The web offers the possibility of unprecedented access to information and interaction for many people with disabilities. Accessibility barriers to print, audio and visual media can be much more easily overcome through web technologies.

In addition, it is important to note that web accessibility is required by law. WAI Web Accessibility Policy Resources (www.w3.org/WAI/policy-res) links to resources for addressing legal and policy factors within organizations, including a list of relevant laws and policies around the world.

How does the USF CMS help with accessibility?

The templates in the USF CMS were built closely following Web Content Accessibility Guidelines (WCAG) 2.0 and Section 508. However, the content you add to your pages should also be checked. The system can perform an Accessibility Check which identifies any issues that may be present relating to the type of accessibility standards. The report can include known issues, likely issues, and potential issues. This way, you can correct accessibility errors before you publish a web page.

Keep in mind that errors that may be identified that are in areas that cannot be edited by the user. For instance, if the error is in the header, this is generally only editable by an administrator. In those cases, the user should pass the identified error on to their CMS Liaison to review it. Script errors are typically controlled by the vendor and cannot be updated.

What are the USF Form Guidelines?

Online forms are a great way to add functionality to your website. They allow you to collect information from your website visitors, and save that information into a spreadsheet or database for future reference.

You can create a form that allows your website visitors to request additional information about your services and programs. Other forms allow site visitors to RSVP for an event you are hosting, apply for entrance into a program, have their name added to your mailing list, or register for a course.

Of course, there are guidelines for creating online forms. These guidelines are here to protect our website visitors from hackers who may try to steal sensitive, confidential information, such as social security numbers, credit card information, or medical records. That's why it is critically important for you to review our form guidelines before you develop your forms.

Form Guidelines

It is critically important that ALL web forms meet university guidelines. These guidelines are based on federal, state and local laws and official BOG-approved USF policies, and were developed to protect our website visitors from fraud. Failure to abide by these guidelines will result in your forms being deleted from university servers.

- Observe all HIPAA and FERPA laws.
  HIPPA: http://www.usf.edu/it/services/data-security.aspx
  FERPA: http://www.registrar.usf.edu/presentation/ferpa_quiz/
- Do not process financial transactions online. If you need to create an online form that enables you to collect funds, then contact IT Web Services (webservices@usf.edu) for information about online payment services.
- Do not collect social security numbers.
- Do not collect financial information of any kind, including credit card information.
- Do not collect medical records of any kind, including immunization forms, etc.

For more information about the USF System's official policy on information security, review the Information Disclosure and Confidentiality policy at http://generalcounsel.usf.edu/policies-and-procedures/pdfs/policy-0-019.pdf.

How do I integrate a form with my new website?

Now that you have reviewed the USF Form Guidelines, it's time to start integrating web forms into your site. You may already have existing forms you'd like to integrate, and you may have new forms you'd like to create. The following information will help you.

Existing Forms

Do you have existing forms that you want to continue to use on your website? If so, IT can help you skin these forms so that they look like the rest of your new website. This would include updating the header and footer and styling your form's content so that it matches the rest of your site.

New Forms

Do you need to create new forms to use on your website? If so, please contact IT Web Services for guidance.

What types of Assets are already available?

Departments/units throughout campus can use any of the assets tagged "main-usf" on their own websites, but cannot edit any photos, icons, or text. They can be found by clicking on "Assets" under the Content tab.

The Office of University Communications and Marketing maintains all these assets.

Text on Main usf.edu

- main-usf-text-about
  This asset provides overview information about USF.
  Located on the main USF website: http://www.usf.edu/about-usf/index.aspx

- main-usf-text-about-tampa
  This asset describes the Tampa region.
  Located on the main USF website: http://www.usf.edu/about-usf/leadership.aspx

- main-usf-text-about-this-site
  This asset describes technology information and privacy policy of usf.edu.
  Located on the main USF website: http://www.usf.edu/about-usf/about-this-site.aspx

- main-usf-text-academics
  This asset provides an overview of academics.
  Located on the main USF website: http://www.usf.edu/academics/index.aspx

- main-usf-text-administrative-units
  This asset lists all of the academic units on the Tampa campus.
  Located on the main USF website: http://www.usf.edu/about-usf/administrative-units.aspx

- main-usf-text-admissions
  This asset provides an overview of admissions.
  Located on the main USF website: http://www.usf.edu/admission/apply.aspx

- main-usf-text-board-of-governors
  This text asset is about the Board of Governors.
  Located on the main USF website: http://www.usf.edu/about-usf/leadership.aspx

- main-usf-text-board-of-trustees
  This text asset describes the Board of Trustees.
  Located on the main USF website: http://www.usf.edu/about-usf/leadership.aspx

- main-usf-text-boilerplate-system

This asset contains the official boilerplate statement for the USF System.

- main-usf-text-boilerplate-usf
  This asset contains the official USF boilerplate provided by UCM.

- main-usf-text-campus-life
  This asset provides an overview of campus life.
  Located on the main USF website: http://www.usf.edu/campus-life/index.aspx

- main-usf-text-contact-usf
  This asset lists the contact information for the most common departments/units on the Tampa campus.
  Located on the main USF website: http://www.usf.edu/about-usf/contact-usf.aspx

- main-usf-text-facts
  This asset provides facts and statistics about USF.
  Located on the main USF website: http://www.usf.edu/about-usf/facts.aspx

- main-usf-text-history
  This asset lists major points in USF history.
  Located on the main USF website: http://www.usf.edu/about-usf/history.aspx

- main-usf-text-office-of-the-president
  This text asset describes the Office of the President.
  Located on the main USF website: http://www.usf.edu/about-usf/leadership.aspx

- main-usf-text-office-of-the-provost
  This text asset describes the Office of the Provost
  Located on the main USF website: http://www.usf.edu/about-usf/leadership.aspx

- main-usf-text-points-of-pride
  This asset provides the official Points of Pride as determined by the Office of Decision Support.
  Located on the main USF website: http://www.usf.edu/about-usf/points-of-pride.aspx

- main-usf-text-research
  This asset provides an overview of research.
  Located on the main USF website: http://www.usf.edu/research/index.aspx

- main-usf-text-site-map
  This asset contains the site map of the main usf.edu (pages within the CMS).
  Located on the main USF website: http://www.usf.edu/about-usf/site-map.aspx

- main-usf-text-strategic-initiatives
  This asset describes the current strategic initiatives at USF.
  Located on the main USF website: http://www.usf.edu/about-usf/strategic-initiatives.aspx

- main-usf-text-traditions
  This asset provides information on traditions at USF.
  Located on the main USF website: http://www.usf.edu/about-usf/traditions.aspx

Media Contacts

All of these assets are located on the Media Contacts page within the UCM site: http://www.usf.edu/ucm/media/index.aspx

- main-usf-text-ucm-media
  This asset contains the contact information for the media/public affairs team in UCM.

- main-usf-text-athletics-media
  This asset provides the contact information for the USF Athletics media team.

- main-usf-text-upd-media
  This asset contains media contact information for UP.

- main-usf-text-usfsm-media
  This asset contains the contact information for the USF Sarasota-Manatee media team.

- main-usf-text-usfsp-media
  This asset contains the contact information for the media team at USF St. Petersburg.

What Call to Action icons are already available?

Departments/units throughout campus can use any of the icons already created. If you would like to reqest a custom icon, please contact your liaison.

icon-info	
icon-alert	
icon-book	
icon-calculator	
icon-camera	
icon-cog	
icon-compass	
icon-cap	
icon-clipboard	
icon-envelope	

icon-star	
icon-face	
icon-video	
icon-wireless	
icon-wrench	

icon-two-people	
icon-gift	
icon-handshake	
icon-home	
icon-laptop	
icon-message	
icon-paper	
icon-person-plain	
icon-person-tie	
icon-question-mark	
icon-research	

How do I create a Google Analytics account?

Google Analytics is a free online tracking service that allows you to gather helpful information on how your website is performing. Types of things that you can learn from this data include:

- Which marketing initiatives are most effective
- Accurate website traffic patterns/trends
- Where visitors come from and what they do on the site
- Which keywords resonate with prospects and lead to conversions
- Which online ad or creative is the most effective
- Where people leave the site
- Which pages retain visitors the longest

UCM and IT are unable to create an account for you as it needs to be tied to a specific USF Gmail address. To create a Google Analytics account, follow these steps:

1. Navigate to http://www.google.com/analytics/
2. Click "Sign in".
3. Enter your mail.usf.edu address in the Email Field. This address will probably be your normal usf.edu email address, but with mail.usf.edu instead. For example, ucm@mail.usf.edu.
4. Do not enter anything in the Password Field.
5. Click "Sign in".
6. You will be directed to the USF NetID Single-SignOn Page. Enter your USF NetID in the NetID Field and your NetID Password in the Password Field.
7. You will be redirected back into Google Analytics, this time signed in.
8. Click "Sign up" to begin using Google Analytics, and follow the steps listed in the creation process.

If you experience problems, it could be that you do not have a mail.usf.edu address assigned to you. Please contact IT (help@usf.edu) to set one up or use a non-USF gmail account (example@gmail.com).

UCM and IT do not offer instructional or technical support for Google Analytics. It is the responsibility of the department to obtain training on how to use this product and run their own reports. Google provides in-depth training resources that you can access for free at https://support.google.com/analytics

Web Templates Terms of Use

Scope:

Please refer to USF System Policy 0-206, Digital Communications for scope of official external and internal USF System websites.

Requirement:

All official USF System sites (both internal and external) as outlined in USF System Policy 0-206, are required to migrate in to the USF content management system (CMS) (external) or the Portal (internal) and must use the templates provided. These sites are subject to review and approval by University Communications and Marketing (UCM) and Information Technology (IT) prior to launching. UCM and IT reserve the right to review launched sites periodically for quality assurance.

If you feel that your unit requires features not currently part of the standard templates for either the CMS or the Portal, please email webservices@usf.edu. In your request, you must provide the reason that you feel your unit requires custom templates. Custom requests will be considered by UCM in consultation with IT Web Services and exceptions may or may not be granted. Depending on the scope of work, custom development may be subject to a fee if approved.

Modifications:

All USF template code is the property of UCM and IT. The code seen in a source code view IS NOT, and MAY NOT be used as, a template. You may not use this code, a reverse-engineered version of this code, or its associated visual presentation in whole or in part to create spin-off work. You may not override stylesheets without the prior approval of UCM and IT.

Applications / Databases / Forms:

Applications, databases, and online forms will not migrate to the CMS or the Portal. However, they are required to adhere to the branding of the official templates created by UCM. Separate template files will be provided by IT Web Services on a case-by-case basis for units that have their other content within the CMS. These files are provided with the expressed intent to use only for the applications, databases, or forms that have been identified. They may not be used in any other way and follow the modification terms listed above.

Accessibility:

All USF websites that have been given permission by UCM and IT to live outside of the USF CMS or Portal (i.e. applications, databases, and online forms) must comply with state and federal accessibility standards.

Third Parties:

Separate template files will be provided by IT Web Services on a case-by-case basis. These files are provided with the expressed intent to use only for the application that it was given. They may not be used in any other way and follow the modification terms listed above.

Revocation of Privileges:

Parties who violate these terms, and who have not been granted an exception by UCM and IT, will be reviewed by the Office of the President for potential revocation of privileges to publish websites representing USF or any part of USF.

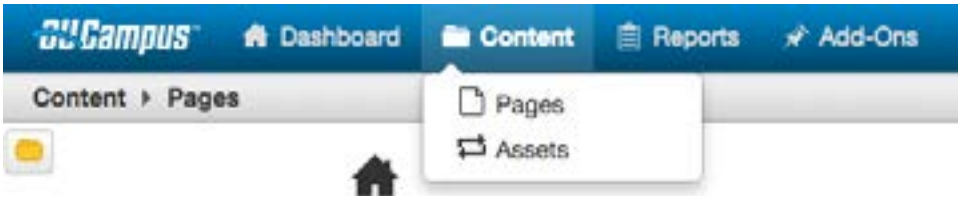
Updating a Legacy Rotator

If you have an older version of the rotator asset on your homepage, these directions will allow you to contunue to update your existing rotator until you are able to convert to the new format. Converting requires some manual updates to occur on the back-end. Please schedule your conversion by emailing webservices@usf.edu and allow at least 5 business days for work to be completed.

To change/add/delete photos in Rotator

Prepare all images PRIOR to uploading in the USF CMS by following these guidelines:

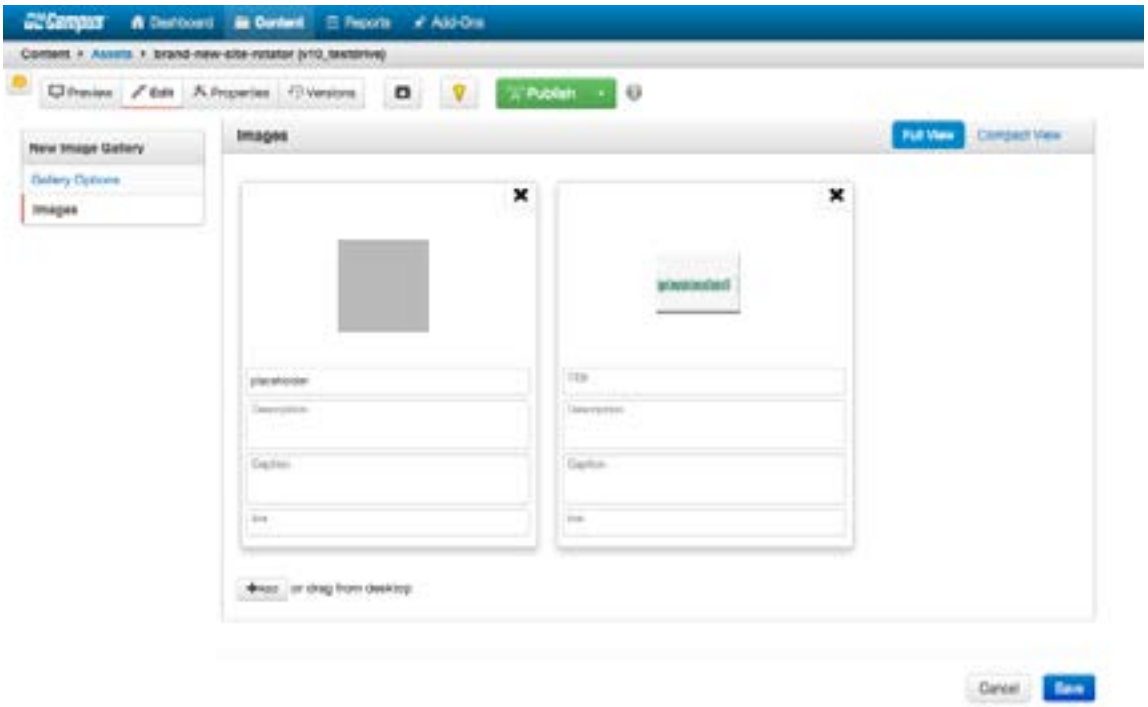
- Use the highest quality version of the image (for example, 300 ppi).
- Open the image in Photoshop, or a similar image-editing program.
- Crop the image to 660 pixels by 371 pixels for use in a small rotator or 1000 pixels by 371 pixels for use in a large rotator. Make sure that the image is in RGB format and not CMYK.
- Save the file as a jpg. (**Note:** Do not use the Save for Web function.)



1. Navigate to and select your rotator.

DO NOT make changes to the top section. Edit ONLY the “Images” area.

2. Either click **Add** to browse to the document(s) you would like to upload or drag and drop the file(s) from your computer.



3. Enter **Title**.
4. Enter **Desciption.** This will be the alternative text that will appear for screen readers and helps keep the site in compliance with accessibility standards.
5. Enter **Caption**.
6. Enter URL of where you would like it to link to.
7. Click **Save**.

You can change the order of the photos by clicking, holding, and dragging to desired location in the rotation. **The Rotator feature should have no more than five photos**.

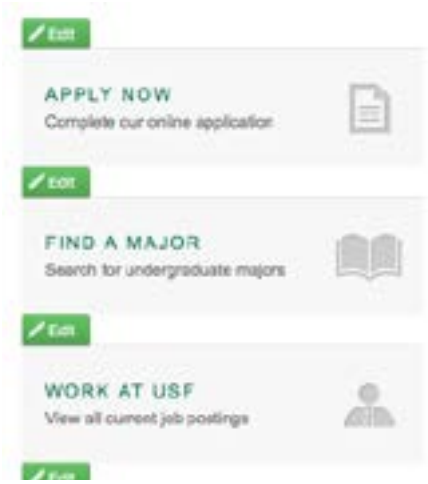
8. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Updating Legacy Call to Action Boxes

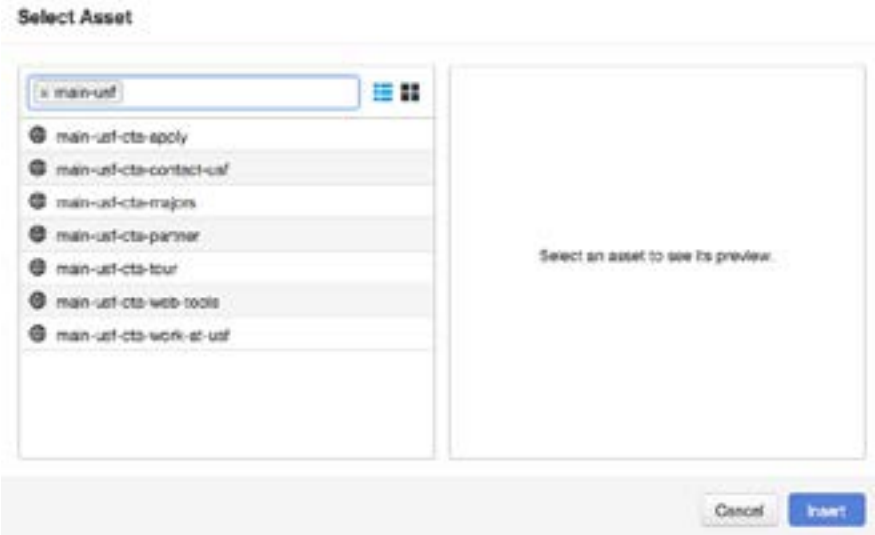
If you have the older version of Call to Action (CTA) boxes on your homepage, these directions will allow you to contunue to update your existing CTAs until you are able to convert to the new format. Converting requires some manual updates to occur on the back-end. Please schedule your conversion by emailing webservices@usf.edu and allow at least 5 business days for work to be completed.

To change Call to Action Boxes

1. Click **Edit** button above the Call to Action you wish to change.



2. Select new Call to Action from list.
3. Click **Insert**.



4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

Updating Legacy Text Navigation

If you have the older version of text navigation items on your homepage, these directions will allow you to contunue to update your existing items until you are able to convert to the new format.Converting requires some manual updates to occur on the back-end. Please schedule your conversion by emailing webservices@usf.edu and allow at least 5 business days for work to be completed.

To change Text Navigation

1. Click orange **MultiEdit** button at the top of the screen.

2. Complete the Text Navigation portion of the form.

3. Click **Save**.
4. From the Publish drop down menu, select which action is appropriate for your permission level/workflow (Publish, Schedule, Submit for Approval, etc.).

CMS User Guide Updates

This page will serve as a reference for you to see which pages within the CMS User Guide were updated, what changed and when those updates were made. These are listed with the most recent changes at the top of the page.

February 22, 2017

- Page 88: Updated #5 to clarify grid instructions and inserting rows.
- Page 89: Added instructions on how to remove an image from the page.

August 14, 2016

- Page 18: Updated template image and broke out header and footer specs.
- Pages 19 - 22: Updated header and footer sections.
- Page 23: Updated homepage template image and specs.
- Page 61: Added drop down menu information to Properties File section.
- Page 74-75: Updated adding social media information.
- Page 83: Added Sub Navigation (Drop Down Menu) section.

Past changes can be found here:
http://www.usf.edu/ucm/marketing/technical-manual-change-log.aspx