Content Management System (CMS) Training

Web Resources, Policies, Standards, & Guides

Visit the College Communications Marketing Toolbox at marketing-toolbox.davison.edu.

- CMS Documentation – www.davidson.edu/cms-docs
- Accessibility Guidelines/Requirements – http://www.davidson.edu/accessibility
- Graphic Identity Standards – www.davidson.edu/graphic-identity
- College Style Guide – www.davidson.edu/style-guide
- Digital Standards/Governance – www.davidson.edu/digital-standards
- Web Redesign Project Blog – blogs.davidson.edu/webredesign
- College Communications Creative Services – www.davidson.edu/creative-services

Digital Communications Services

Website Development and Planning
Whether you are creating a new site or revamping an existing site, we will work with you to help identify your web needs, as well as set goals and objectives for your website. As part of this process, we will help you develop your site’s navigational structure and we are available to assist with content development and editing services.

Content Management System Training
Most new sites are created in the college’s new content management system (CMS). The CMS offers web content publishers an intuitive user interface that once trained, is as easy to use as Microsoft Word. The CMS allows you to concentrate on content and not worry about design.

If you need assistance with updating your department website, please contact us at 704-894-2242 or digitalstaff@davidson.edu.

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CMS Workflow Process

A centralized review of all CMS content is done before any page is published to the Davidson website. All content is reviewed by a member of the College Communications digital staff. The objective is to maintain the integrity of the Davidson website by identifying content with quality, style, accessibility, and functionality issues before it is published for the public to see and that it displays properly across multiple devices and screen sizes—desktop computer, tablets, and mobile.

How Much Time will it Take to Approve Content Submitted for Review?
Typically, pages will be reviewed and approved same-day by the digital staff depending on a variety of factors, including the volume of pages received at any given time, the quality of content submitted for approval (whether it requires additional revisions by the CMS author before being published), and the content’s complexity.

Plan Your Content Updates Accordingly (avoid “emergencies”)
Waiting to the last minute to make content changes does not constitute an emergency, especially if you had plenty of advance time to make a content change. We do understand that true emergencies do occur and in these cases you are advised to contact us directly at digitalstaff@davidson.edu.

Content Submissions after Business Hours
Content submissions submitted after business hours will be addressed next business day. Content submitted during college closures or holidays will be addressed next business day.

CMS Content Review Checks
Each new or edited page should be evaluated against a series of checks before it is published to the live website. Checks include:

- **Quality of content** – grammar, spelling, typos, written in a web-optimized format, proper subheadings usage, page title optimized for SEO and intuitive to visitors
- **Visuals** – are the images used consistent with site standards, are they sized appropriately?
- **Style** – is the content consistent with the college style guide? Some leeway is given for content that needs to meet certain academic standards (citations, formatting, etc.)
- **Web standards** – does the HTML code comply with current web development standards? Does it comply with college digital standards as approved by the Digital Governance Board?
- **Accessibility standards** – does the page or content comply with accessibility standards, e.g., alt text for images, not displaying text as an image, issues with color contrast, correctly using headings, captioning video, text transcripts for audio, etc.
- **Responsiveness** – will the content on the page adjust properly for display on desktop computers, tablets, and mobile phones?
- **Site Integrity** – does the page location make sense, is there anything on the page that will impact the site, visitors, or other CMS users?
- **Search Engine Optimization (SEO)** – is the content optimized for indexing by search engines, e.g., proper page title, correct use of subheadings. The digital staff adds meta data to ensure good SEO.
- **Legal** – does the page comply with college policies, state and federal laws, etc., e.g., copyright

It is incumbent upon each content editor to ensure their content meets these standards. If content doesn’t meet the standards, digital staff may return the page in Workflow for further attention. Digital staff members are tasked with upholding the college’s standards for style and content and periodically audit content outside of workflow.
Logging in to Ingeniux CMS

To access the Ingeniux CMS, go to the following address and log in with your Davidson College network username and password.

**CMS Live Site:** [http://cms.davidson.edu/](http://cms.davidson.edu/) - redirects to [http://sunshine.davidson.edu/cms9](http://sunshine.davidson.edu/cms9)

Enter your *Davidson* network username (without @davidson.edu) and password.

When Ingeniux launches, you will see this screen first.

At your first login, your site tree will be collapsed on the left side of the page.

Pictured on your left is your Ingeniux Dashboard. You can navigate to your department website by opening the site tree and scrolling through pages, using the Page View tab, or by using the "Go To" box.
Navigating to Your Site in Ingeniux

There are three ways to navigate to your site.

- The Site Tree
- The "Go to" field
- The Page View tab

1. The Site Tree

After your first login, Ingeniux CMS will usually open with the site tree expanded to the pages you have permissions to update. If your site tree is collapsed, it might look like this:

Navigate to your site by opening the following folders:

+ Content Store
+ Site Folder
+ Davidson College
+ [your department website]

Areas you have permission to update will show up as **bold** in the site tree. All other areas will be grayed out which means you have “Read Only” permissions to view the content on these pages.

2. The "Go to" field

A quick way to get to your site is to use the "Go to" field in the main toolbar. Just type in the name or xID of your page.
3. The Page View Tab

You can navigate to your site by clicking on the Page View tab and following the links as you would on the live site. This is typically the slowest way to get to your site.

You also use the Page View tab to preview a page before sending it to Digital Group for review and publishing.
The Ingeniux User Interface

Top Menu Icons

Dashboard – Create a new page, view assignments, pages recently visited

New – Create a new page

Save – Save your changes

Rename – Rename page that is actively selected and assigned to you in workflow

Assign To – Assign the page to yourself or another person in your work group for edits or comments [Do Not Use]

Advance – Advance your page in workflow edit, send to department editor, to the digital group (for help or to review/publish the page)

Spellcheck – Use Spell Check to check all of the fields in Ingeniux for misspelled words.

Refresh – Refresh your session

Preview – Preview your page in a new window (This does not save your edits.)

Assets – Upload an image (.jpg, .png, .gif) or document (PDF, Word, Excel, etc.)

Go to – Type in the name or ID of a page and jump to that page.

Sign Out – Log out of Ingeniux
Tabs and Accordions

- **Edit Form Tab** – Allows you to edit a page assigned to you in workflow.
- **Page View (Preview) Tab** – Preview the page before you send it on in workflow for review by an editor or the digital group.
- **Analytics** – View web traffic statistics (from Google Analytics).
- **Site Tab** – Site tree view of the entire Davidson site.
- **Assignments Tab** – Lists all pages that are currently assigned to your user account. Clicking the “Group Assignments” area shows those assigned to your department group.
- **Search Tab** – Search the Davidson site tree for a particular page.

Editing an Existing Page in Ingeniux

1. Navigate to the page

2. **Advance Page in Workflow**
   To edit a page, you need to click *Advance in Workflow* and choose “Revise or Edit Page” in the dropdown menu.

   *(Tip: Page Properties at the top of the page shows you to whom the page is currently assigned.)*

   **IMPORTANT:** If you want to remove a page from the website, choose the *Request Digital Group Review for Removal from Site*.  

4. Select your name from the available list of names and click okay.

(Tip: Names in blue indicate people who are currently logged in.)

6. Edit text as needed in Body
You can use the WYSIWYG editor for most formatting needs.

See page 9 for a list of editing tools.

7. When ready, advance the page to the next step in the workflow
(You might see: “Send to Digital Group for Review & Publish” or “Send to Editor for Review”).

Advance Page to Digital Group for Review & Publish

When you've finished working on a page and wish to have the page added to the Davidson website, click the Advance in Workflow button and then select Send to Digital Group for Review & Publish. You will then be prompted to choose a member of the Digital Group. Select All Users in Group so the person on duty is assigned the page in workflow to review.
Formatting Your Text
You can apply formatting to your text in the Body area after typing or pasting text.

**HTML** - View and edit the HTML for the page.

**Copy** - Copy text from the body area to paste in another area of the page (e.g. description, keywords, or page headline)

**Cut** - Cut text from the body copy area

**Paste** - Paste from your clipboard

**Paste as Text** - Paste as text allows you to paste text stripped of formatting. (Recommended)

**Paste from Word** - Use when pasting text from Word so that the CMS will remove the extraneous Microsoft code.

**Bold** - Make highlighted text bold; **Italic** - Make highlighted text italicized

Created a numbered or bulleted list

**Insert Link** - Highlight text and select the link icon to make links to pages, files, email addresses, etc. (PC/Mac users can right click and choose "Insert Link"). See more at "Making Links."

**Unlink** - Highlight text and select the unlink icon to remove links (PC/Mac users can right click and choose "Remove Link").

**Insert an image** – Should be sized for the web and in .jpg or .png format.

Insert common characters and symbols

**Bold** - Make highlighted text bold

**Italic** - Make highlighted text italicized

**Superscript and Subscript**

**Format (subheadings)** – Select subheading – Heading 2, Heading 3, & Heading 4

**Styles** (images) – Used with photos and displaying on the left or right side of page
Adding Links

Adding Internal Links, External Links, Document Links, and Email Links

Select the text that will become the link. Click the “Insert Link” icon 🔄. (Mac and PC users can also right-click and choose “Insert/Edit Link”)

The "Link Properties" section will vary based on the type of link you choose.

Internal Link

You can populate the Internal Links (links to other pages in the CMS) using two methods.

- Enter the name of a page, e.g., academics. You will see one or more options to choose from
- Enter the xID if you are linking to a page in the Ingeniux CMS. Once you type in the xID, Ingeniux will supply the page name.

Tip: To find the xID, you can scroll over the page in the site tree with your mouse.

IMPORTANT: Be sure to include a title description for each internal, external, document, and email link.
**External Link**

Type or **copy/paste the full URL** (e.g. [http://www.google.com](http://www.google.com)).

**IMPORTANT:** All pages and sites located outside of the CMS are considered external links.

**IMPORTANT:** For reasons of usability and accessibility all internal and external links should always open in the same window (not a new window) unless there are technical reasons for opening in a new window.

**Email Link**

Enter the recipient's **email address** and a title. Typically include “Send an email” in the title field.

**IMPORTANT:** When adding email addresses to webpages write out the full address. Some website visitors use webmail and an email client will not open on their computer.

Example: Contact Doug at digitalstaff@davidson.edu or 704-894-2242 verses contact the digital staff at 704-894-2242.

**Document Link**

Use the browse button to **search your document folder in Ingeniux**.

For more information about uploading and linking to documents see the “Uploading Attachments” section on the next page.
Attachments

General Rules Regarding Attachments

Avoid Posting Short Attachments
If an attachment is short (1-2 pages) consider creating an HTML page. You should avoid posting a one or two page PDF or Word file if the same content can be easily conveyed in HTML (as a webpage).

Never Post Attachments by Themselves Without an Introduction
Attachments should never be posted as the only content on a page without any introductory text. In many cases, if you are posting a long attachment, e.g., a booklet, brochure, etc., you can typically take the introduction used in the attachment and included it within your new webpage and then post the attached document. See an example webpage with an introduction at http://www.davidson.edu/student-handbook.

File Name Format for Attachments
The file name for an attachment appears in the web address for the file. When uploading attachments to the CMS eliminate any spaces in the file name by using hyphens between words and change to all lowercase letters, e.g., application-form.pdf, reunion-brochure.pdf. This avoids the attachment file name from appearing differently than the rest of the davidson.edu URL and avoids the dreaded %20 from being automatically inserted in your URL (i.e., %20 replacing the spaces in your attachment filename).

Declare Link Attachments
Out of courtesy for web visitors, always clearly identify webpage attachments as shown below. Attachments require additional computer software to load, which can be an annoyance for visitors wanting to find information quickly and easily.

• Brochure (PDF)
• Application (DOC)
• Budget Form (XLS)
• Presentation (PPT)

Adding Document Meta Data

Add File Information and Meta Data to Attachment Page Properties
Most users upload attachments to the website without ever reviewing the Page or Document Properties of an attachment. This makes it harder for search engines to index the attachment documents and often means they are displayed in search results with missing or wrong information and are not in compliance with federal accessibility guidelines.

Microsoft Word
In Microsoft Word go to File > Properties

Make sure your document has to following information:
• Title
• Author: list name and/or Davidson College. Often we find just the first part of an email address listed, e.g., “dominor,” or last name first “Minor, Doug.”
• Company: add Davidson College to the Company field
• Keywords: add some keywords that describe what is in your document
In Adobe Acrobat go to File > Properties

Make sure your document has the following information:

- **Title**
- **Author** (should be Davidson College, but could also be author's full name if applicable).
- Include Davidson College in Company field
- Add some keywords that describe what is in your document

**Complete the Document Properties**

[Image showing the Document Properties window with filled fields]

- **Select Document Title in Initial View Tab**
- **Set English as Language in Advanced Tab**
Uploading Attachments

Adding attachments within webpages involves selecting the text on your page you want as your link, selecting where you want to upload the attachment, and then uploading the attachment from your computer to the CMS.

Select the text you want to use as the link for your attachment. With the link text highlighted, choose the Insert/edit link icon in the toolbar (the same icon you click for adding internal and external webpage links).

Click the browse icon next to the Document field in the Insert/edit link window.

Find the CMS Upload location (folder) where you would like to upload the document. If you will be uploading many similar documents, consider creating a new folder to store the attachments.

Select File to Upload from your computer or network drive.

Select the file you have uploaded to the CMS and then click the Ok button to close the window.

Note: If a document with the same name already exists in your folder, you will be prompted and given a choice of whether or not to overwrite the file.
Accessibility Requirements

All documents added to the Davidson website must comply with federal accessibility guidelines. Documents must be accessible to those with disabilities—vision (blind, low vision, color blindness), hearing (deaf or moderate-to-mild hearing loss), mobility (inability to use a mouse) and cognitive (dyslexia, traumatic brain injury, ADHD, autism, etc.). For more information about document accessibility requirements visit the accessibility website at http://www.davidson.edu/accessibility/document-accessibility.

Please Note: Documents sent through CMS workflow that are not in compliance will be flagged for remediation. This may delay the publishing of your webpages or documents, depending on document page length, complexity of the design and flagged issues and the availability of staff to remediate documents. Documents will not be posted until they are fully compliant with federal accessibility guidelines. Be sure to plan ahead.

Document Accessibility Best Practices

• Use built-in headings, a proper heading structure and offer a logical reading order.
• Avoid posting images of text. All text must be “readable” and scanned text run through OCR.
• Provide alternate text for all visuals, including images and charts. Avoid displaying text as part of images.
• Provide an appropriate color contrast between text and page background.
• Use a simple table structure, and specify column header information. Avoid split cells, merge cells and nested tables.
• Add meaningful hyperlink text. For example, instead of linking to the text “click here”, include the full title of the destination page. Also, link descriptive text phrases instead of listing long URLs since they are read aloud by screen readers.
• Use bulleted and numbered lists.

Never Post PDF Files that are Scanned Documents or Created Using Print/Save as PDF on Mac
You should never post PDF files that you receive as scanned documents. When documents are scanned via a photocopier they are output as an image. This is an inaccessible format for the visually impaired. Additionally, search engines cannot index this format.

The “Save as PDF” option available in the print window on Mac computers also outputs PDF content as an image, an inaccessible format for the visually impaired that also can't be indexed by search engines.

Microsoft Office Accessibility Checkers
All new versions of Microsoft Office come with built in accessibility checkers. Be sure to review the accessibility of your office documents before exporting them to PDF and uploading to the content management system.

Adobe Acrobat (for PDF)
All PDF files published to the website must meet federal accessibility requirements. If you regularly publish PDF files to the college website, you need to familiarize yourself with PDF accessibility requirements and how to remediate issues in Adobe Acrobat DC, which is available for free to all faculty and staff.
Images

Image Best Practices

- Only quality images that aren’t blurry, not pixelated, and are sized correctly will be posted to the Davidson website.
- **All images that are added to the Davidson website must be optimized for the web and resized at a resolution of 72 dpi.** In comparison, images used in a quality print publication might be printed at a resolution of 300 dpi or 150 dpi for a newspaper.
- Most modern digital cameras with a high megapixel count will capture photos at 200-300 dpi.
- Color photos are typically added to the website in .jpg format. Other formats included .png and .gif (gifs are typically used for line art or illustrations that are done in 1-2 colors and should never be used for displaying color or black and white photography).

**IMPORTANT:** You should never take an unedited image from a digital camera, add it to the CMS, and then drag to resize it in the CMS. This distorts the image aspect ratio and the original image will take much longer to load than an image that has been properly resized and exported at the proper resolution through an image editing software program like Photoshop. Large image resolutions and sizes take much longer to download on slower connections, e.g., 3G over mobile, DSL, etc.

Image Editing Software (Free)
There are a variety of free online services that will resize images to appear at 72 dpi, allow you to do basic photo edits and corrections (remove red eye, adjust exposure, tone, contrast, and color, sharpen images, etc.). When considering free solutions, make sure the final exported image is saved at a resolution of 72 dpi.

Pixlr Editor, a free online editing service available at [http://pixlr.com/editor](http://pixlr.com/editor), allows you to upload images that can be color corrected, resized, cropped, and exported at a resolution of 72 dpi and in a format ready for the web.

Image Editing Software (Paid)
All faculty and staff can request access to Adobe Creative Cloud. This suite of applications includes Photoshop, which is used for editing and resizing images. Contact the Help Desk to request this software.

Requesting Assistance with Images
Contact a member of the digital communications staff at digitalstaff@davidson.edu if you need assistance with images or would like to discuss the purchase or selection of image editing software.

Image Sizes

Three-Column Pages
If a three-column page already has images in the right column and/or in the masthead, you should avoid adding images within the main body copy area to prevent the page appearing over crowded. Contact digitalstaff@davidson.edu for guidance on how best to display images on three column pages.

Two-Column Pages
Go no wider than 350px wide at 72 dpi. Typically, an image size of 200-250 px wide at 72 dpi wide provides enough width to display nicely on the page. Strive for consistency in image quality and sizes when adding images to department websites.
Inserting an Image into Page

Insert your cursor in the Body Copy area where you want the image to appear. **Click on the “Insert Image” icon.**

(PC/Mac users can also right click and choose “Insert/Edit Image”).

The Insert/Edit Image window will then appear.

The Insert/Edit Image window allows you to insert an Image Description (Alt or Alternative Text) and an Image Title.

**Alternative Text (Alt Text)**

List as “Image Description” in the “Insert/Edit Image” window.

**IMPORTANT:** Descriptive text used to describe your image. This is important for those that are visually impaired and using screen readers or other assistive technology. It's also used by Google to understand what your photo is about.

**Image Title**

This is additional short, concise advisory information about the image. It's often seen when you hover over it in some browsers.

**Styles Menu: Floating Your Photo on Left or Right**

After you insert your image, the final step is to select to display or float your image on the left or right side of the page.

With your image selected, select left or right from the Styles Menu.

Since people read left to right, the Davidson site-wide style preference is to display images on the right.
Responsive Design

The new Davidson website features a responsive design where pages and the content within them adjusts automatically to the screen size available. An image added at a large size will be downsized when viewed vertically on a tablet or on a mobile phone. Photo choices, their subject matter, and size needs to account for being displayed on desktop, tablet, and mobile screens.
Create a New Page via the Ingeniux Dashboard

Click “Dashboard” in the Ingeniux menu bar.

Under the “Create Content” section click “Detail Page” or if creating a news story, the News Detail Page, then add a page name, and click the paper icon.

**IMPORTANT:** The Page Name will appear in the URL for a CMS page (also what is listed in the site tree). The Page Title appears at the top of a webpage and in the left navigation.

From the “Select a Location for the New Page” menu, choose where you would like to locate your page on your assigned site.

Create a New Page via the New Button

Click on the “New” button in the Ingeniux toolbar

If you want to create a lower level page choose “Detail Page.” If you want to create a news story, choose “News Detail Page.”
Complete Required Fields on Newly Created Page

Complete Required Detail Page Fields

- Page Name
- Page Title
- Body

If you try to advance the page without filling in a required field, you’ll be prompted with an error message. The Abstract field is optional, but should be completed by including 1-2 short sentences that summarizes the content that is on your new webpage. Your abstract will be reviewed by the digital staff and used as meta data for the page.

Preview Your Page

Click on the Page View tab to see how the page will look on the live website. Always be sure to test all of your links before sending to the Digital Staff for review and publishing. When you preview the page in the Page View tab, the CMS automatically saves it.
Submitting Pages for Review & Publish

How Pages Get Published

When you’ve finished working on the page, click the **Advance in Workflow** button and then select:

Send to Digital Group for Review & Publish

**Important:** Only send the page for Digital Group Review when you are completely finished with the page and wish for it to be published to the live website.

The Digital Group may send pages back to an author or editor for further work or revisions if the page doesn’t meet standards for quality, style, accessibility, and other criteria or if there are other issues on the page that require your attention.

Writing News Stories

The Davidson website provides departments with space on their homepages to display news stories that are either written by the College Communications staff or written by a department CMS author. For a news story to appear on a department homepage it must be tagged using taxonomy and keywords. All news stories are tagged by the digital staff as part of the CMS page review and approval process.

**What a News Story is Not**
A news story is not a single photograph or video without accompanying text. It’s not a list of award recipients, a single sentence, or a single file attachment or web link. A news story is a text-based story supported with photographs, video, or links.

**How to Write a News Story**
A news story typically covers the who, what, when, where, why, and how of something.

- **WHO:** will do, said or did something
- **WHAT:** will be done, has been done, was said or happened
- **WHEN:** it will be done, it was said or happened
- **WHERE:** it will be done, it was said or happened
- **WHY:** it will be done, it was said or happened
- **HOW** it will affect me or how it was done

**Write Effective News Story Headlines**
Be descriptive, write in an active voice, and use strong present-tense verbs. Your headline should invite the visitor to read more. Strive for short, meaningful headlines. Keep your headlines to one or two lines max.

**Inverted Pyramid: Include Most Important Information at the Top**
News stories like webpage pages follow the inverted pyramid style of writing with the most important facts and information at the top of the page in the first few sentences and paragraphs. Sentences and paragraphs should be kept short avoiding the use of jargon and acronyms, and written for the layperson to understand.
IMPORTANT: If you have a news story idea contact digitalstaff@davidson.edu and we may assign a writer to assist you with your news story. News stories that are written by College Communications will be tagged to appear on department homepages that are set up to display news headlines.

Creating a News Stories

Like most webpages, it works best for you to write your webpage content ahead of time in Microsoft Word and then simply copy and paste the information into Ingeniux.

News Stories in Ingeniux CMS

To create a News Story you need to use a News Detail Page
News pages are located in a different area of the site (not under department sites).

Go to Dashboard: Choose a new News Detail page.

Name Your Page in the Dashboard

Page Name Format: YYMMDD Short Page Title (the Page Name will be the URL so keep it short)

See examples below:

Page Name: 130920 Thespians Produce Interactive Techno-Play

Finally click the new page icon as shown on the left and then choose the location for your new News Detail page.

In the Select a Location for the New Page window, choose where you would like to locate the new news detail page.
In the Edit Form window, complete all of the required fields:

**Page Name** (appears in site tree and as the URL of your live page). Include the date of the news story in the Page Name as YYMMDD then the a short title.

**Page Title** (appears as the headline for your news story)

**Date** (date of your news story)

**Body** (written copy for your news story)

**Excerpt**
Provide a 1-2 sentence excerpt of your news story. The excerpt is displayed in some top level webpages.

**Advance in Workflow** to either editor or digital group for review & publish