OASYS END USER TRAINING

Online Authoring Systems & Services | Introduction
Why are you here?

• To learn about the OASYS End User Program
  – Why? So you can be aware of and take advantage of training and support

• To learn about the School’s Web policies and guidelines
  – Why? So you can be aware of Web best practices

• To Learn Sitecore Content Management
  – Why? So you can edit your department’s website(s) efficiently and effectively
Who we support | Sitecore websites

- http://medicine.tufts.edu
- http://md.tufts.edu
- http://publichealth.tufts.edu
- http://sackler.tufts.edu
- http://fletcher.tufts.edu
- http://www.tuftsctsi.org
Training program goals

Session One:
- Learn about OASYS
- Learn about Best Practices
- Learn about Sitecore CMS
- How to log into Sitecore
- Learn about Sitecore’s interface
- How to create pages
- Learn about templates, sidebars, and versioning

Session Two
- How to edit content
- How to upload and insert media
- Learn about workflow
- How to publish
- How to create a Microsite
- Learn advanced tips on editing and formatting
- How to get certified
- Where to go for support
Your input & requested feedback

What you’ll teach us:

• Whether there are bugs
• What user documentation is required
• How we can improve training process
• Help define level of support required – how much training, one-on-one support, and in what format
• What could be changed about the application to make it easier to use
• How workflow will be implemented for each department
Course syllabus | Session one

- What is OASYS - Overview of the End User Program
  - Training and Support
  - User Roles and Responsibilities
  - Requesting a Sitecore Account
  - User Certification
- Best Practices Explained - Tufts' Web Policies and Guidelines
  - Branding
  - Usability
  - Editorial
- Getting Started in Sitecore
  - What is a Content Management System? - An Overview of Sitecore
  - Browsers & Logging in
  - Getting situated - The User Interface
  - Working with Pages - Templates, Sidebars, and Versioning
- Summary, Questions and Answers
What is the OASYS end user program?

What is OASYS anyway?

- Online Authoring System and Services

What are the components?

- Training and Support
- User Roles and Responsibilities
- Requesting a Sitecore User Account
- User Certification
OASYS | Training and support

- Submit a ticket to oit@tufts.edu or cpr@tufts.edu
- We will provide support via email or phone
- Non-training related requests/bugs will be reviewed & prioritized
- Training delivered in multiple formats
- User group sessions to drive improvement and development
- Reference user documentation website address:
  - TUSM-Web-Communications/Sitecore-User-Documentation
  - Fletcher.tufts.edu/Web-Communications

https://medicine.tufts.edu/Who-We-Are/Administrative-Offices/Office-of-Information-Technology-Microsite/TUSM-Web-Communications/Sitecore-User-Documentation
Fletcher.tufts.edu/Web-Communications/OASYS-Web-Content-Management/Training
OASYS | User roles & responsibilities

Responsibilities

• Not all users have the same level of access to features
• The level of role determines which areas and functionality will be available
• Role level determines access to applications, commands, and publishing rights

Roles

• **Writer** – edit existing pages, must submit content for approval
• **Senior Writer** – edit existing pages and create new pages, must submit content for approval
• **Editor** – edit existing pages, create and/or delete pages, and approve content, and responsible for publication even if created by a content user
OASYS | Requesting a Sitecore account

Steps to obtaining an account

• Identify approver
• Select a user role
• Contact approver, approver contacts OIT
• Enroll in training
• Pass certification test
• Access live website
Certified OASYS Web Publisher

- Demonstrate basic editing proficiency using Sitecore
- Pass an online proficiency exam
- Allows access to the live production websites

Examination

- Short test based on the training program
- Sitecore editing basics
- Web publishing policies and best practices
Web governance

Website Policies and Guidelines

• Users must accept responsibility (because you can edit a page, doesn’t mean you should)

• Each section or page may have an editor, an approver, and a business owner

• All users must abide by their School’s policies, including branding and editorial guidelines

• Users are encouraged to participate in and serve on the OASYS user committee
Best practices guidelines

What are best practices?
• They are an established or proven method to effectively deliver the best results

Why are guidelines important?
• They help Web editors across locations and affiliations to create and maintain a consistent experience for visitors to their websites

What are the different types of guidelines?
• Branding – a way to consistently present an organization’s identity
• Usability – ensures visitors can easily interact with the website
• Editorial – a particular style of writing content most appropriate for the Web

TUSM-Web-Communications/Web-Policies-and-Guidelines
Fletcher.tufts.edu/Web-Communications/Web-Policies-and-Guidelines
Best practices guidelines | Branding

What constitutes branding?

- Templates reflect a mix of University and School-specific branding
- Keep in mind the types of elements when building or editing Web pages:
  - Names
  - Logos
  - Graphics
  - Shapes
  - Colors
Best practices guidelines | Usability

What constitutes usability?

• How visitors will achieve their goals when interacting with the site

• The website should be structured with consideration for the following elements:
  o Navigation
  o Search Engine Optimization (SEO)
  o Images
  o Labels
  o Functionality
Best practices guidelines | Editorial

What constitutes editorial?

• How visitors consume content on the website
  o Well-organized – break up information with headers, sidebars
  o Clear and concise – keep it short and simple
  o Direct – lead with key information, get to the point, state purpose
  o Action – use calls to action, make them visible

• Consistent use of capitalization, punctuation and other stylistic choices
  – In most cases, both Schools refer to AP Stylebook
  – School-specific style books are available in the online user docs
Getting started in Sitecore

• What is a Content Management System? - An Overview of Sitecore
• Browsers & Logging in
• Getting situated - The User Interface
• Working with Pages - Templates, Sidebars and Versioning
Getting started | Sitecore CMS

What is Sitecore and why should I use it?

• Sitecore is a company that builds Web Content Management software
• CMS software enables users to create, manage, store and publish content on Web pages
• CMS is useful because:
  o Many people can use it at the same time
  o Users can focus on content instead of building the site
  o It is easier to create content without knowing coding
  o Changes can be made and viewed before going to the live site
Getting started | Training fundamentals

• You will be learning on the training site, not in the production site.
  – Example Training Authoring URL: https://train-fletcher-auth.tusm-oit.org/sitecore/login
  – Example Training Delivery URL: http://train-fletcher.tusm-oit.org/
  – Looks like the real site, but is not available for public viewing

• Production access will be granted when training is complete
  – Example Production Authoring URL: https://fletcher-auth.moit.tufts.edu/sitecore/login
  – Example Production Delivery URL: http://fletcher.tufts.edu/

• Sitecore is browser-based, there is no software to install

• You are encouraged to log in and practice whenever you like
Getting started | Browsers & login

Supported Browsers
- Microsoft Internet Explorer 7 and later
- Mozilla Firefox 3.6 and later
- Google Chrome 5 and later
- Apple Safari 5 and later

Login
- From home, log into the university VPN – Network Connect
- "tufts\" and your UTLN name (same account you use to log into your computer)
- Password
- Choose the user interface

TUSM-Web-Communications/Sitecore-User-Documentation/Getting-Started
Fletcher.tufts.edu/Web-Communications/Sitecore-User-Documentation/Getting-Started
Getting started | The user interface

Three basic parts
• Content tree (left side)
• User interface (right side)
• Ribbon (top)

Two ways to work in the system
• Use the ribbon at the top
• Use the mouse to right click on pages in content tree
Working with pages

Pages
• Creating a page
• Moving a page
• Deleting a page
• Quick page edit
• Versioning

Templates
• Kinds of templates
• Tabbed page
• FAQ page

Sidebars
• Location of sidebars: Metadata folder
• Creating a sidebar
• Insert a sidebar
Working with pages | Creating

• A new page can be created by several methods:
  
  - Method A:
    • Under the Home tab in the Insert group, click the Page command
  
  - Method B:
    • Right click on a page in the content tree and move the pointer over Insert
    • Click on Insert, move the pointer over the first item in the list entitled “Page” and click on its name
  
• A popup window will appear. Enter a new page name and click the “OK” button. The new page will be inserted under the selected page.
Working with pages | Moving

• A page can be moved by several methods:
  – Method A:
    • Under the Home tab in the Sorting group, click the appropriate command represented by blue arrow icons labeled Up, Down, First, or Last
  – Method B:
    • In the Content Tree, right click on the page to be deleted and move the pointer over Sorting
    • Click on Sorting, move the pointer over the item in the list labeled Up, Down, First, or Last
Working with pages | Deleting

• A page can be deleted by several methods:
  – Method A:
    • Under the Home tab in the Operations group, click the red “X” icon to delete a page
    • Selecting the Delete command displays a Delete Subitems option
  – Method B:
    • In the Content Tree, right click on the page to be deleted and move the pointer over the Delete command
    • Click on Delete to remove the page
Working with pages | Quick edit

- Select a page you want to edit
- Lock the page to get into editing mode
- Can edit the title field immediately
- Click on “show editor” to access content
- Make edit, select “accept”
- Save the page
- Preview the page (under Publish tab)
Working with pages | Versions

• A version represents an additional iteration or copy of a page
• Locking an item for editing creates a new version (even if no text changes are made, and you check it back in without saving)
• “Modified by log” shows who made changes and when

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Modified By</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/8/2012</td>
<td>9:09 AM</td>
<td>tufts\cvail01</td>
</tr>
<tr>
<td>1/24/2012</td>
<td>3:26 PM</td>
<td>tufts\cvail01</td>
</tr>
<tr>
<td>7/12/2012</td>
<td>1:34 PM</td>
<td>tufts\cvail01</td>
</tr>
</tbody>
</table>

• In production the limit is 10 versions, in training it is unlimited
• Use “Compare” to pull up side by side versions to show differences
Working with pages | Versions

• Versions can be viewed by several methods:
  – Method A:
    • Under the Versions tab in the Version group, click the dropdown arrow next to the Versions command to display the list
  – Method B:
    • In the Content Pane, click the small blue box with a number (representing the number of versions) within the white tab to the right of the page
    • This will also display a list containing existing versions of the currently selected page
Working with pages | Templates

• A list of existing templates can be accessed by several methods:
  - Method A:
    • Under the Home tab in the Insert group, click the bottom dropdown arrow to display a list of available templates
    • Scroll up or down the list to view available templates
  - Method B:
    • Right click on a page in the content tree and move the pointer over Insert
    • Click on Insert, move the pointer over the desired template and click on the name of the template
• Select “Insert,” then “FAQ page” from the menu
• Name your page
• Note there are two “Show Editor” areas, the top is text above your list, and bottom is text below
• Right click on the FAQ page, select insert FAQ
• Type your question
• Use the Rich Text Editor to add an answer
• Select “accept” and save
• Use the up/down arrows in the Home tab to order questions
Working with pages | Templates | Tabbed

• Select “Insert,” then “Tabbed page” from the menu
• Name your page
• Note there are two “Show Editor” areas – top is text above your list, and bottom is text below
• Right click on the Tabbed page, select insert Page Tab
• Type the name of the Tab
• Use the Rich Text Editor to add text
• Select “accept” and save
• Use the up and down arrows in the Home tab to order tabs
The metadata folder is a library where certain types of data are stored. In addition to sidebars, this data can include home page items, utility and footer navigation.
Working with pages | Sidebar | Creating

- Open the Metadata library under the left-hand Content Editor tree
- Open the “Sidebars” folder and find the appropriate subfolder
- Lock and edit
- Provide title and text
- Upload image if desired
- Save
- Check in, submit and approve
- Attach to a page
Working with pages | Sidebars | Inserting

- Locate the “Sidebars” field area of the user interface
- Use the left-hand menu to identify and select the sidebars you wish to add to a page
- Double click on sidebars you wish to add
- Use the arrows on the right to order sidebars

Tips

- Sidebars look best on pages without vertical images
- Not all templates allow sidebars
Summary, questions and answers

• Feel free to experiment – be careful with the delete option
• The best way to learn Sitecore is to use Sitecore
• Reference user documentation website address:
  – TUSM-Web-Communications/Sitecore-User-Documentation
  – Fletcher.tufts.edu/Web-Communications
• Questions
• Homework

https://medicine.tufts.edu/Who-We-Are/Administrative-Offices/Office-of-Information-Technology-Microsite/TUSM-Web-Communications/Sitecore-User-Documentation
Fletcher.tufts.edu/Web-Communications/OASYS-Web-Content-Management/Training
Training program goals

Session One:
• Learn about OASYS
• Learn about Best Practices
• Learn about Sitecore CMS
• How to log into Sitecore
• Learn about Sitecore’s interface
• How to create pages
• Learn about templates, sidebars and versioning

Session Two
• How to edit content
• How to upload and insert media
• Learn about workflow
• How to publish
• How to create a Microsite
• Learn advanced tips on editing and formatting
• How to get certified
• Where to go for support
Course syllabus | Session two

- Review - A Look Back At Session One
- Introduction to Content
  - Editing Content
  - Uploading and Inserting Media - The Media Library
  - Publishing and Workflow
- Putting it all together
  - Microsite
  - Editing and Formatting Tips
  - Advanced Tips
- Final Steps
  - Certification
  - Publishing Credentials
  - Support
- Summary, Questions and Answers
Review | A look back at session one

- What is OASYS - Overview of the End User Program
  - Training and Support
  - User Roles and Responsibilities
  - Requesting a Sitecore Account
  - User Certification

- Best Practices Explained - Tufts' Web Policies and Guidelines
  - Branding
  - Usability
  - Editorial

- Getting Started in Sitecore
  - What is a Content Management System? - An Overview of Sitecore
  - Browsers & Login
  - Getting situated - The User Interface
  - Working with Pages - Templates, Sidebars, and Versioning

- Summary, Questions and Answers
Introduction to content

• Editing Content
• Uploading and Inserting Media - The Media Library
• Publishing and Workflow
Editing content

• The Content Editor
• The Rich Text Editor
• Links
  – Internal Links
  – External Links
Editing content | Content Editor

To edit body copy, follow these steps:

- Locate the page and click “lock and edit” in the yellow box
- Locate the Content field within the Content section
- Click “Show Editor” or double click the box
- The Rich Text Editor window will open, allowing access to the content
Editing content | Rich Text Editor

• The Rich Text Editor window displays when the "Show Editor" text is selected
• The ribbon at the top of this window features a variety of commands
• The layout and functions are similar to the Microsoft Word ribbon
• Commands are grouped by function in the ribbon
  – Formatting Group  – Command Group
  – Link Group  – Table Group
Editing content | Internal links

- Open the Rich Text Editor
- Highlight the text you want to link
- Use the chain link icon in the RTE toolbar
- Select the page you want to link to from the menu
- Scroll down and select accept
- Save and follow steps for publishing
Editing content | External links

- Open the Rich Text Editor
- Highlight the text you want to link
- Use the external link icon (globe) in the RTE toolbar
- In the dialog box, type in the URL
- Add link text if needed
- Choose how you want that link to open
- Click OK
- Save and follow steps for publishing
Media library

- The Media Library
- Image sizes
- Uploading images
- Inserting images
- Uploading PDFs
- Linking PDFs
Media library

• Use the Media Library to store media files including PDFs and images

• The Content Tree is organized by website name and subfolder

• There are several sections:
  – Media Library
  – Folder & Content Tabs
  – Options Area
  – Media Area
Media library | Image sizes

• Size images before uploading

• Use the following width x height dimensions
  – Vertical/portrait size
    • 170x227 pixels
    • 290x387 pixels
  – Landscape (maximum width 700 pixels)
    • 300x350 pixels
  – Sidebar
    • 170x122 pixels
Media library | Uploading images

• Open the Media Library Content Tree and locate the folder where the files will be uploaded

• Click the Folder tab in the Content Pane to display three options for uploading files:
  – Upload Files icon – select to upload one file
  – Upload Files (Advanced) – select to upload multiple files
  – New Folder – select to create a new Content Tree Folder

• Provide “alt” tag description when the mouse is rolled over the image

• Save item (will publish automatically)
Media library | Inserting an image

• Locate and open the page in the Content Tree where the image file will be added
• Lock and edit
• In the Picture section select Browse
• Locate the folder and select the image(s)
• Click the Open button to insert the Picture File field of the page
• Add a caption (option) and save
Media Library | Uploading PDFs

- Find “Media Library” folder either in the left-hand content tree or in a bottom tab
- Locate the PDF folder & sub folder (if appropriate)
- Open folder and select “upload files” (advanced for multiple files)
- Use dialog box to browse for the PDFs
- Select the file and click upload or open
- Double click on PDF and add information/date
- Right click on PDF to rename it
- Save item (will publish automatically)

Tip: Media library items don’t go through workflow – they publish every 10 minutes
Media library | Linking PDFs

- Select the “Content Editor” tab
- Locate a page in the content tree
- Lock and edit the page
- Open the rich text editor and select text you want to use for PDF link (or create it)
- Select “Insert Sitecore link” symbol from the menu (gray chain link)
- Select “Media Items” tab and locate your PDF
- Select PDF, click “link”, click “accept”
- Save and preview to test link
Publishing and workflow

- What is publishing?
- What is workflow?
- Unlocking content and logging out
Workflow

What is workflow?

• Workflow is a built-in series of steps that allows users to submit their work to an approver who in turn reviews the content.

• The approver can either approve it for publication or send it back for revision.

• Under “Review” tab, select:
  – Check In (unlocks your content so others can edit)
  – Submit (moves it on to next workflow stage)
  – Approve (queues up your content for publishing)
Publishing

What is publishing?

- A form of content promotion that copies content from the “work in progress” environment (authoring) to the “live” site (production)
- An editor or administrator can publish content after review
- Media Library items are published automatically

What happens when you publish?

- For the training site - automatic publishing is set for 10 minutes
- For the production site - publishing is scheduled for every hour
- After this time you can check the site to see your changes
Putting it all together

- Microsites
- Editing and Formatting Tips
- Advanced Tips
Microsites

What is a microsite?
• A Microsite is a landing page that will contain left-hand navigation

When should I use a Microsite?
• When it’s an entirely new organization or department
• If it’s a new conference for example, a new microsite can be used, but should still reside under the existing department

How do I add a Microsite?
• Follow the same method as a new page (for TUSM, insert at the Home page level and move to the appropriate position)
Editing and formatting tips

• After saving a page, Sitecore may randomly adjust the layout of content
• Use the HTML editor to fine tune formatting:
  – Check code that will affect spacing:
    • Paragraph tags: `<p><br /></p>`
    • Header tags: `<h3>Editing</h3>`
  – Check for extraneous code after pasting into the Content Editor:
    • Extra code: `<div style="border-style: border-windowtext;">`
• Always review your work in preview before publishing and on the live site after publishing
Advanced tips

Getting the most out of Sitecore

• Hide a page on the live site
• Retrieve a deleted file
• Paste plain text into the Content Editor
• Create the proper image sizes prior to uploading
• Customize/add a missing tab to the Ribbon
Unlocking content

• An item can be unlocked via the Review Tab by several methods:
  
  – Method A:
    • Review Tab > Workflow Group > Check In Command
  
  – Method B:
    • Review Tab > Locks > My Items Command
    • A window will open and display all of your locked items
    • Select “unlock all” at the bottom
Logging out of Sitecore

• You can log out of Sitecore by several methods:
  – Method A:
    • Select the red Sitecore icon at the top left of the screen, and choose the Exit command
  – Method B (if using the Desktop interface):
    • Select the white Sitecore icon at the bottom left of the screen, and choose the keys icon
Final steps

• Certification
• Publishing credentials
• Support
Final steps | Certification

To become certified users must:

• Be comfortable with application
• Users must agree to web policies & procedures
• Users must pass the certification test
  – Sitecore editing basics
  – Web publishing policies and best practices
• Once you pass the test, you will be a certified OASYS web publisher, and you will receive access to the production site
Final steps | Publishing credentials

• Credentials to the production (live) site will be provided upon certification

• You will have graduated
  – From the training site
    • Authoring URL: https://train-fletcher-auth.tusm-oit.org/sitecore/login
    • Delivery URL: http://train-fletcher.tusm-oit.org/
  – To the production (live) site
    • Authoring URL: https://fletcher-auth.moit.tufts.edu/sitecore/login
    • Delivery URL: http://fletcher.tufts.edu/
Final steps | Support

• Sitecore application and support related services
  – For fastest service contact oit@tufts.edu (TUSM) or cpr@tufts.edu (Fletcher)
  – Available during normal business hours

• Training
  – contact oit@tufts.edu (TUSM) or cpr@tufts.edu (Fletcher): during normal business hours
  – Nick.Azzarito@tufts.edu: available by appointment
  – Geoff.Marsh@tufts.edu: available by appointment

• Emergency publishing requests after normal business hours
  – Claire.Vail@tufts.edu
  – Office: 617.636.0478, Cell: 617.935.1701
Summary, questions and answers

• Feel free to experiment – be careful with the delete option
• The best way to learn Sitecore is to use Sitecore
• Refer to the user documentation for help
• Reference user documentation website address:
  - TUSM-Web-Communications/Sitecore-User-Documentation
  - Fletcher.tufts.edu/Web-Communications
OFFICE OF INFORMATION TECHNOLOGY

OASYS End User Training
Thank you for attending!