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Chapter 1: Introduction

This guide will be a step-by-step tutorial to the Adobe Experience Manager (AEM) Web Content Management System (CMS). Adobe recently rebranded the tool from Adobe CQ5 to Adobe Experience Manager (AEM) and you might notice both terms being used in the system.

1.1 Responsive Design
Responsive Design means that as a window changes size, the content is able to adjust accordingly, scaling up/down buttons, pictures, and menus in order to make the website more user-friendly for the device it’s being rendered on.

Example: Visit [www.bgsu.edu](http://www.bgsu.edu), experiment by resizing the window; you will notice that the menu will collapse on itself, and the picture will get smaller if needed.

1.2 Edit Anywhere
With this CMS, users can edit Web pages no matter where they are by logging in to the Adobe CMS. Whether the user is at home, in the office, or on their laptop in the lobby somewhere, making quick changes is fast and easy.
1.3 Logging In
In order to access the Adobe CMS, you must log in to the designated Web page using your BGSU username and password.

Tips for Login:
- Use Mozilla Firefox when logging in if possible.
  - Google Chrome and Safari will work, but with bugs.
  - Internet Explorer and the Adobe CMS do not get along.
- Depending on your computer’s settings and software, you may get security warnings when logging in to this site. Always click the option that will allow you to proceed to the website.

1. Use this link to get to AEM: [www.bgsu.edu/aem](http://www.bgsu.edu/aem)
2. Log in using your BGSU username and password (excluding “@bgsu.edu”)
   a. What you will see on first login, if you don’t see the screen below, make sure you clicked the link above or typed it in properly.

3. Once logged in to AEM, the screen should display as shown below.
4. If your screen doesn’t display as shown in #3 and looks like the screen below, please go through the following steps.
   a. Once logged in, select Sites.
      i. This area is a new user interface (UI) that Adobe recently launched. We are still using the classic user interface until the new system is completely finished.

   b. Once Sites is selected, click on the computer icon on that same Sites tab.
      i. This will get you to the classic UI from the new user interface.
Chapter 2: AEM Overview

Adobe Experience Manager Interface:

Your screen is divided into several sections:

- The console is the top green area, which is how you will navigate between the Web Content Manager (WCM) tab where all the websites are stored and the Digital Asset Manager (DAM) tab where all your assets are stored (Ex: photos and documents).
- The tool bar is at the top over the right pane in gray and will be explained in more detail later in the overview.
- The left pane is along the left-hand side and consists of all of the “parent” pages, which will be explained in more detail later in the overview.
- The right pane shows “children,” or subsets pages, of what is selected in the left pane.
2.1 Parent Child Relationship
AEM’s system builds its websites on parent and child relationships. As you can see in the image below, all of the University websites live under the parent page of Bowling Green State University.

2.2 Left Pane:
The left pane is how a user will locate their webpage. Under Bowling Green State University > Bowling Green State University are all of the websites in the system. To view all of the child pages under the parent page, select the Plus sign beside the parent page.

If you are having trouble finding a website, follow the URL structure. For example, the http://www.bgsu.edu/about/student-life.html webpage can be found under Bowling Green State University. Then navigate to the About BGSU parent page and you will see the Student Life page in the right pane.

2.3 Right Pane
The right pane is how a user will access their child pages. Once the parent page is selected in the left pane, the child pages will appear in the right pane. This pane displays the title and name of the page, when the page was last publish, when and if the page was modified, the status of the page and finally what template is being used for the page.
Chapter 3: DAM Overview

The DAM is our Digital Assets Management system, which is where all users can add images and documents. To navigate to the DAM, select the camera icon in the console.

Once you have selected the DAM you will see a site layout similar to the websites view. The folder structure will be in the left pane and the children assets/folders will appear in the right pane. Once you select your folder there will typically be three folders inside it, including Images-c, Documents and Images. Documents will include all Word documents, PDFs, etc. Images-c was used in the transition as a placeholder for images that were brought over from the old content management system. All new images should be added to the Images folder.
3.1 Adding a Folder
If you have a lot of images or documents, we highly recommend that you create additional folders to help organize your content.

1. To create a folder, you will go to New… carat in the toolbar
2. Select New Folder.

3. Once you select, New Folder you will get the following dialog box.
   a. The order of the Title and Name is reversed from how they appear in the New Page dialog box. If you forget which is which, reference the description below the text field.

4. Fill in Name of folder.
   a. The Name will be the URL of the asset.
      i. DO NOT use spaces or special characters in the Name field.
   b. The Title is what will be shown in the CMS.
3.2 Uploading Images

It is important to remember before adding a document or image to the system to rename them without any special characters or spaces. These will break across the site if either is included.

1. Once you have re-titled the asset without spaces or special characters.
   a. It is important to give the asset a name that is descriptive of its contents.
      i. Increases searchable,
2. Select the folder you would like the assets to be in.
3. Drag and drop the asset onto the right pane of the page.

**Once the asset has been added to the DAM you can add additional information and make changes by double clicking on the asset, which will bring up its meta-data information in a new AEM tab.

3.3 Uploading Documents

Uploading documents can be done exactly like uploading images.

1. Once documents are renamed without any special characters.
2. Select a Folder
3. Drag and drop into the right pane.
   **If adding multiple documents at a time, the system may take more time to properly process all of the assets.
A difference with documents is the system does attempt to parse through a document that has “readable” text. This increases search capabilities on both our internal AEM search and the BGSU website search.

**3.4 Change Asset File Name**

If you do drag and drop your assets with spaces or need to update the name.

1. Select the asset you would like to change the name for.
2. Click Move… (Like you would move a page)
3. The Move dialog box will give the option to Rename to, type in the new asset’s filename, which will also update the URL.

**3.5 Asset Meta-Data Tab**

From this Meta-data tab, you can download the asset or update it. You can update it by adding more information, the more you add the more intuitive our search is in finding that asset. Listed below are some commonly used image meta-data and descriptions:

- **Title**: Same as the title in right pane, it will show when the image is hovered in live view.
- **Description**: Provides a place to give more information about the photo, for others who may use it.
- **Tags**: Click drop down and select different tags that associate with your photo.

**After making changes, save them by hitting the Save button at the bottom of the page.**
3.6 Replace Original Image/Rendition

If you have an asset on the website already and need to update it, we recommend using this feature. This will not only update it across the website, but will save you time by not having to remove the old asset and relinking.

1. In the Meta-Data Tab, find the far right column, call Renditions.
2. Select Original File
   a. Always at bottom of list.
3. Click Upload in the bottom right corner.
   a. An Add or Overwrite a Rendition dialog box will appear
   b. DO NOT change the Rendition Name.
4. Click browse.
5. Select new file.
6. After you have added the new file, save your changes.
7. Re-activate the asset.
3.7 Activating Assets

Activating an asset can be done several ways. The easiest is selecting the asset and clicking Activate in the toolbar.

When activating, deactivating, or modifying assets there are different indicators that allow you to see where the asset is in the workflow. The phases are displayed with small colored squares in the right pane.

- **Green square**: The asset is activated and online.

- **Red square**: The asset is deactivated and not online.

- **Orange square**: The asset’s activation is pending.
  - If you hover over the orange box it will tell you what number the asset is in the activation queue. Click the blue refresh icon to update the status.

- **Blue square**: The asset has been modified since it was last activated.
Chapter 4: WCM Overview

The WCM is our Web Content Management system, which is where all users can add and edit web pages. To navigate to the WCM, select the globe icon in the console.

Once you have selected the WCM icon you will see a site layout similar to the DAM view. The folder structure will be in the left pane and the children web pages/folders will appear in the right pane, exactly like the DAM.

4.1 Creating a Page

1. Select your website in the left pane
   a. The child pages will appear in the right pane.
2. To create a page, click on the dropdown for New…
3. Select New Page…

4. Create Page dialog box should then appear.
   a. Each page requires a Title, Name and Template.
5. Fill in Title of page.
   a. Will appear in the CMS and on your live webpage.
6. Fill in Name of the page.
   a. Will appear in the URL.
   b. If not specified, Name will automatically be created based on Title, after page is created.
   c. DO NOT to include spaces or special characters in the Name, they will not work in the URL (dashes - will work).
7. Select Tertiary Template.
   a. Almost of all the pages in the site use the tertiary template, with few exceptions.
8. Click Create.
9. Once page is created, it will appear in the right-hand pane with the other child pages.

4.2 Toolbar
The page toolbar is above the right pane. This is where you can copy, paste, activate or deactivate pages. The tools are also available if you right click on a page in the right page pane.
Listed below is what each function does to the selected pages in the right panel:

- **Copy**: Copy a page and its children.
- **Delete**: As long as the page isn’t linked to from other websites in the system you can delete the page. There is **NOT** a way to get back deleted pages.
- **Activate**: This is the process of pushing a page live on the website.
- **Deactivate**: This will remove the page from being live on the site but keep it in the AEM system.
- **Workflow**: This can be set up on request. It gives system authors and administrators options to send information back and forth before publishing changes.
4.3 Page Properties

If you right click on a page and select Properties, the dialog box to the right will appear.

- The title of the webpage will fill in automatically and it corresponds with the Title of the page in the right pane.
- Hide in Navigation when selected will remove this page from the left navigation on the site.

More Titles and Descriptions:

If you select the carat beside More Titles you will get the option to use multiple titles. Diagram below will show you where each title changes on its corresponding webpage.

- **Page Title**: Will make the title on the page different from what is shown in the CMS.
- **Navigation Title**: Will change name in left navigation to be different than page name. (Ex: If you have a long Title and would like to abbreviate it in the navigation.)
- **Subtitle**: Optional area to add a subtitle to your page. This will not show anywhere on the page itself, but it can be utilized in various customized components.
- **Description**: This is used by the List component to display a “teaser” of an article. You can see this on our BGSU.edu/news website.
Advanced Tab in Page Properties

- Redirect Field
  - Redirect to external website
    - If you want a left navigation link to take you outside of the BGSU website.
      - Can link to website, image, document.
    - Paste the URL into the Redirect field.
  - Redirect to internal website
    - If you want the left navigation to take you to an internal website.
    - Select the magnifying glass, then locate internal page.
      - DO NOT copy and paste internal BGSU website, if someone updates that URL or the name changes, the link will break,
4.4 Move Pages/Rename the URL

If you would like to move a page to a different area of the website, use the Move tool. If, for instance, an office has moved under a different department or you would like to restructure your website, this is how you move pages around within the system.

1. Select the page you would like to move
2. In the toolbar, select Move…
3. Move dialog box will appear
   a. To rename
      i. Type new name into Rename to field
      ii. Select Move.
   b. To move page to different area on website.
      i. Select magnifying glass.
      ii. Select parent page you would like to add this child page to.
      iii. Select Move
4. Additional dialog box will appear asking “Do you really want to move the page to the selected destination?”
   a. If you do, select Yes, and your page will reappear in the new section of the website.
Chapter 5: Editing a Page

In order to edit a page, you must be in Author View. There are a few ways to open a page in the Author View.

- Double-click on the page.
- Right-click on the page and select Open.

The page will open in a new browser tab in the Author View similar to below.

- **Content Finder**: Located on the left side, this is where you will see assets.
- **Sidekick**: By default, located on the right, but you may move it by dragging the green bar at the top of the dialog box. This is the tool you will use to make page modifications.
5.1 Content Finder
The Content Finder allows you to do a variety of things. It holds all the digital assets from the DAM. You will see images from the DAM that automatically populate from most recent modifications. There is a search tool at the top that will search all images of the DAM as well.

At the top of the Content Finder you will see tabs.

- **Images**: The icon to the far left that is already open is the Images section of the DAM.

- **Documents**: The Documents tab is the third from the left. This is where you will see all of the PDFs and Word documents that have been added to the DAM.
  - It works like the Image section where the most recently modified documents appear first, but there is a search option available as well.

To get to the next section you will need to use the arrow button. Once you do you will see this set of tabs.

The two that are highlighted are both very helpful.

- **Pages**: The Pages tab (which looks like a page with a globe on top) is how you can link to other Web pages. We will go more in depth on this later.

- **Browse**: The diagram-looking tab is the Browse tab. It allows you to navigate to specific areas of the website or DAM. This is helpful if you are creating links within your site, or adding multiple documents or images from one folder to a Web page. See the example on the right. You use the Browse tab to open up your folder in the DAM and pull in your images or documents.
5.2 Sidekick
The Sidekick is where most of your useful tools reside. The Sidekick is broken into tabs as well.

- **Components**: These components can be clicked and dragged onto the page. To expand a section, select the plus sign beside each category.
  - General component section is what Adobe gave us out of the box.
  - BGSU component section was specifically built for the BGSU website and will continue to grow as we add components.
  - BGSU Columns section is used to add a row of columns on your page while maintaining the responsiveness of each page.
  - Use BGSU Forms to manipulate and add form fields.

- **Page**: The next tab in your Sidekick is Page.
  - This allows you to perform actions on the page that is open currently.
  - Can bring up the Page Properties dialog box directly from the Author View.
  - You can activate changes while you are working on your page instead of going back to the other view to activate.
  - "Show References..." is a very useful tool that reveals internal pages that are currently linking to the page you are on.

- **Information**: The third tab of the Sidekick.
  - This area will give users an audit log of the page.
  - Each time an edit has been made it will be cataloged here.
  - If for some reason you need to identify who is making edits to the page you can find these usernames and dates in the Audit Log under the Information tab.
• **Versioning:** The fourth tab, that looks like a clock is versioning. This tool stores previous versions of a page.
  - Create Version Section - Useful if you want to manually save information on a page for a later use.
    - Ex: Seasonal information and want the page link to remain the same, create a Fall, Spring and Summer version to edit and activate later.
  - Restore Version Section – Automatically saves a new version of the page each time it is activated.
    - AEM will keep a max of 5 versions.
    - Max age of a version is 30 days, will be deleted after 30 days.
      - If a 6th version is created, the oldest version will be deleted.

• **Workflow:** Workflow is the final tab in your sidekick. This area is available if approvers want to moderate authors making changes.
  - An author can make changes and submit in the Workflow those changes to be reviewed by an approver.
  - This is helpful, but we have found that most users are enabling everyone to activate changes themselves because this system is so easy to use.
  - If you would like to set up a workflow for your office, please email cmsproject@bgsu.edu and we will set this up for you.

• **Icons:** There are 4 very useful icons on the bottom of your Sidekick.
  - **Edit:** The pencil icon will activate edit mode on the page.
  - **Preview:** The magnifying glass icon will let you preview the page close to the way it will look live. It removes the drop zones and most of the editing features and placeholders. There are a few components that do not preview or function as they will in the live version, but this is a fairly accurate preview.
- **Websites**: The icon that looks like the globe is websites. It will open up another tab with the Web Content Manager.
- **Refresh**: The circling arrows icon is Refresh, which will refresh the page.

### 5.3 Drop Zones

**Adding Drop Zones**: There are several ways to add components to a page.

1. First way to add a component is to select a component from the Sidekick and drag and drop it onto the drop zone where you would like it to be placed.
   a. If the component is compatible with the drop zones, that drop zone will be highlighted in purple.
   b. If the component you would like to add is highlighting with a red X, then the component was not built for that area.
2. The second way is to double click the drop zone you want the component added to. This will open a list of components that are available for that drop zone.

Configuring a Drop Zone: After adding a component to a drop zone, some type of placeholder will always show, indicating that you’ve added the component successfully. These will usually disappear after configuring the component.

- The above image is showing what a text box looks like before any text has been added to it.
- The second item is what a majority of the components will look like until they have been configured properly.
  - If a component has some areas filled out but is still asking to be configured, that usually means not every item that needs to be filled out has been.
    - Ex: Call Out Box and Staff Profile Widgets both require an image, and will appear as shown above until the text AND image have been added.
5.4 Text Component

The Text Component is one that you will likely use on every webpage. It has robust features built into it that will offer a variety of styling to a page.

The Text Component is set up similarly to a Word document with styling including **bold**, *italicize*, and *underline* along with left, right and center alignment options.

- **Text Component Editing Views:** There are two different editing views of the text component.
  - The dialog editing mode will open when the text components is double-clicked, or if the user right-clicks the components and selects Edit.
    - To save changes, click the OK button and the dialog box will disappear.
  - The incline editing mode can be opened by clicking on the text component once to select it, and then clicking once more on that same selected text component. The component will then outline in orange, and a blinking cursor will appear.
    - The incline editing mode will expand as text is added, which is helpful for editing pages with a lot of text.
• The tools will be at the very top of your browser if you are in the incline editing mode.
• To save changes, click somewhere outside the incline editing mode selection and make sure the component no longer has the orange outline.

• Text Editing Options

  o **Copy/Paste**: The Text Component copy and paste is very easy to use.
    • Use keyboard commands as an option:
      • Copy (Mac Command+C, PC Ctrl+C)
      • Paste (Mac Command+V, PC Ctrl+V)
      • Cut (Mac Command+X, PC Ctrl+X)
    • The icons at the top let you paste text into the page in a variety of options.
      • Cut, Copy, Paste, Paste as Text, and Paste from Word.
        o Paste as Text will remove all styling from your text.
        o Paste from Word will try to maintain the styling from Word without adding extra styles.
        o We highly recommend using the Paste from Word when applicable.
• **Undo/Redo:** The blue arrows to the right of the paste icons in the toolbar are Undo and Redo.
  - You can also use your keyboard commands for this as well:
    - Undo (Mac Command+Z, Pc Ctrl+Z)
    - Redo (Mac Command+Y, PC Ctrl+Y)

• **Hyperlinks:** Using the globe icons you can link and unlink text and images to and from other Web pages or assets. Once you have highlighted the text, the globe will turn full color and you will get the following dialog box.

### 5.5 Hyperlinks
The MOST important thing to remember for all internal links is to link using the magnifying glass. An additional dialog box will open and you can dive into the website structure or assets to find what you would like it to hyperlink to.
Once you have selected the page you want to link to, select OK and it will fill in the Hyperlink dialog box with the correct link. Select OK and the text will be hyperlinked.

If you would like to link to an email address add a “mailto:” before the user’s email address. For example add to the link to dialog box “mailto:falcon@bgsu.edu”.

- **Hyperlink to a website outside of BGSU website**
  - If the link you need to link to is outside the BGSU website, you can simply copy and paste the link into the Hyperlink dialog box. It is important to only do this for external links because otherwise the AEM system will not know the link is internal and won’t relink properly if items are moved or changed.

- **Hyperlink using Pages or Browse in Content Finder**
  - Highlight the text/image you want to become a link.
    - Drag the page you would like linked on top of the Text Component (it will highlight in purple).
  - Alternatively, you can drag and drop the asset into the hyperlink dialog box. This method **MUST** be used when using Browse (in the content finder) to link documents from the DAM. The Pages tab will also allow you to search for your page.
5.6 Format Text

In the Style and Format drop downs of the Text Component you will find some options to stylize your text.

- **Format:** The format dropdown provides options for headings 2-6 and a blockquote.
  - Heading 2 is the biggest
  - Heading 6 is the smallest size text.
  - Blockquote will add a grey vertical line with your text and adjust the left margin.
  - To switch between these formats, highlight the text and select the new format you’d like.

- **Style:** The Style drop down provides additional text style options. However, only one style can be applied to highlighted text.
  - **Intro Text:** Intro text will make the selected text bigger and provide a different font to make the text stand out.
  - **Button Gray/Orange:** These buttons are available to make links stand out. After adding a hyperlink to your text, highlight the text and select a button option.
  - **Gray for H1-H6:** After highlighting your text and make it Heading 1-6 you can change the color of the text to Gray by highlighting and selecting this style.

**GRAY FOR H1-H6**

- **Footnote Disclaimer:** Often used in news articles, will decreased font size and change font color to gray.

- **Pull Quote Right/Left:** Used frequently in news articles. This will pull out text from your page and align it to one side of the page and change the style to orange and italicized.
- **Remove Margins on Image**: This style will remove the margin space placed around image by default.

![Remove Margins on Image](image1.png)

![Image with Margins](image2.png)

- **Image & Caption Left/Right**: After highlighting the image and text you would like to use as the caption, you can float the image and caption to the left or right while the rest of the text wraps around.

![Image & Caption Left](image3.png)

![Image & Caption Right](image4.png)
5.7 Adding Images

There are various components that allow you to add text and images, such as the Image component, the Text component and Text and Image component. The most versatile component, that is used most often is the Text component. One of the benefits of the Text Component is the ability to add images directly into the text frame. Once the image is added you get more options for the image, including the ability to add multiple images in one text component, resizing the image, etc.

- To add an image to the Text Component, select an image from the Content Finder.
- Drag it onto your open Text Component.
- You will see the component highlight purple and then appear in your component.

  ![Component Highlighting]

- **Resize Image**: To resize the image in your Text Component, select the image and drag the small white boxes in the corners of the image in and out to make the image smaller or larger.

  ![Resize Image Example]

- **Wrap Text/Align Image**: In the Text component you can also have your text wrap around your image. Right click the image to see four options. If you select right you will see how the image and text will respond like the example below.

  ![Wrap Text/Align Image Example]
5.8 Column Control

Column Control was built to offer some additional design layouts for your Web page. To put it simply, Column Control adds drop zones to your page. These will produce evenly distributed column drops zones and the smaller columns are useful for highlighting a calendar, events or newsfeed. There are five options including:

- 4 column
- 3 column
- 2 column
- ¼ left column ¼ right column (Shown below)
- ¼ left column ¾ right column (Reverse of what is shown below)

If you wish to switch one Column Control to another you will lose the information inside. We recommend copying and pasting the elements into another area of the page or adding an additional Column Control.

Responsive Column Control

Column Control responds to mobile devices by eventually stacking all the columns on top of one another. This is important to remember in case the information you have in this component is in a specific order. The Column Component will stack the leftmost column on top and the rightmost column underneath. The diagram below shows the desktop view with the columns labeled A, B, C, D in order left to right, the diagram to the right shoes the same layout, but how it would appear on a mobile device with the A, B, C, D stacked.
If the information you have in these columns is numerical or alphabetical, remember to add a new Column Control for each row you are building. Although it will build a new drop zone for each component you add to the column, those in the column will remain together. See below example.

If you add an additional Column Control below the original, acting as an additional row, it will resolve the issue.