

Training Manual for Umbraco Components

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Chapter 1: Navigate around the menu

Content

- Site tree
- Shows only the sites you can access
- You can add and edit pages within your sites
- Some site info cannot be changed by editors
- Some site info must be added by editors

Media

- Upload files and images
- Functions the same as the current Umbraco

Forms

- Not covered in this manual. [Watch recorded tutorial](#)
-

Chapter 2: Set up your site

In the Content menu, expand the site tree and locate your site. Each site listed here is not an actual page. Each site listed here is just a container that will house all of the site's pages. The site name is already filled in at the top. **You will never rename this container.**

Content tab

All components in the Content tab are required. Add only one of each. Save and publish after each change, then click Preview to see how it looks.

Section Settings

Contact Information

This information will populate the campus directory. It will also show up in the sidebar of your site. Fill it out as completely as possible.

Rules of thumb:

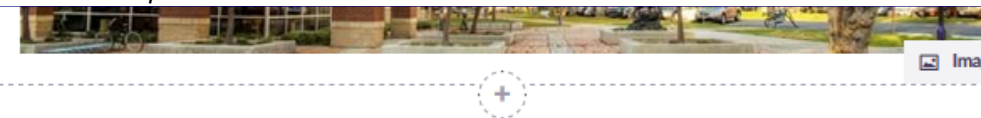
- Location: click Add; search for your building; click the dropdown to select the room #
- Unfortunately, buildings and rooms are listed randomly
- Phone numbers: follow the recommended format, as this will be managed site-wide.

Teaser Information

This information allows other pages to tease this one. It is comparable to the concept of "promoting" a page in the current Umbraco. **Required.** Fill out all items. Different items will be used in the teaser depending on the location of the tease. See Appendix 1 for examples.

- **Media** - choose an image that represents this site.
- **Lead-in Title** - small title above the main title.
- **Title** - this is the main title, the headline.
- **Subtitle** - rarely used
- **Description** - write a brief explanation of what can be done or found on this site.
- **Primary Link** - **Required.** (Otherwise the teaser is pointless).
- **Secondary Links** - enter additional links to supplement the primary link. Optional.

Example:



Lead-in Title
Add context to the Title by adding an accent, lead-in, category, or label.

Title
Encourage readers to explore with a gripping headline. Approx. 25 characters.

Subtitle
Support the Title by explaining more, focusing on the why, or encouraging action.

Description
Convey essential information, set the tone, and entice people to continue exploring this section. Approx. 150 characters.

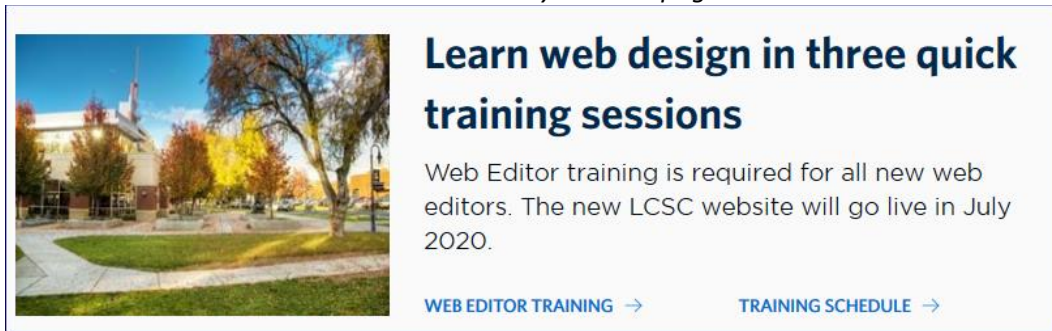
Primary Link
If only one link is displayed, it will be this one. In most cases, it should be your homepage or the page you are currently editing.

[Web Editor Training](#)

Secondary Links
Create the list of links to tease. Less than 5 is recommended.

[Training Schedule](#)

Looks like this when teased by another page:

A screenshot of a website teaser. On the left is a photograph of a building with trees in autumn. To the right of the photo is the heading "Learn web design in three quick training sessions" in a large, bold, dark blue font. Below the heading is a paragraph of text: "Web Editor training is required for all new web editors. The new LCSC website will go live in July 2020." At the bottom of the teaser are two blue links with right-pointing arrows: "WEB EDITOR TRAINING →" and "TRAINING SCHEDULE →".

Learn web design in three quick training sessions

Web Editor training is required for all new web editors. The new LCSC website will go live in July 2020.

[WEB EDITOR TRAINING →](#) [TRAINING SCHEDULE →](#)

Homepage

Select which of this site's pages will be the home page.

If the home page is not yet built, quickly create a new blank home page and then reference it here. The rest of the home page can be designed later.

Navigation tab

The setting(s) in the navigation tab are optional and will override default settings for the site. Not recommended; consult IT to discuss appropriate scenarios.

Menu title

This will override the display of this site throughout the rest of the website. Not recommended; consult IT to discuss appropriate scenarios.

Info tab

This tab primarily contains read-only information. It can also be used to schedule a date to publish or un-publish the site.

Chapter 3: Create a page

Steps

1. Hover over the site to which a page should be added, then click the ellipsis to the right of the site name.
2. Select **Standard** page. (Note: full-width is an option, but is intended only for high-level marketing pages that do not need the breadcrumb pane.)
3. Enter a name in the **Enter a name...** box at the top. This name becomes part of the URL and displays in the site tree and the breadcrumb pane.
4. **Content** tab: use these functions to design the page. (Details are in a later chapter.) At minimum, a page should include at least one element in each of the following areas:
 - Header Content
 - Body Content
5. **Shareability** tab: use these functions to share your page on social media. (Details are in a later chapter.)

6. **Searchability** tab: use these functions to enable search engines to find your page. (Details are in a later chapter.)
7. **Navigation** tab: use these functions to override default settings for the page. (Not recommended; details are in a later chapter.)
8. **Info** tab: use this to see information about your page and/or to schedule a date to publish or un-publish the page.
9. **Save and publish**, then **Preview** the page. (Details are in a later chapter.)

Chapter 4: Add content to a page

If the page does not already have a name, add one at the top now. This name becomes part of the URL and displays in the site tree and the breadcrumb pane.

Content tab

Use these functions to design the page. (Details are in a later chapter.) At minimum, a page should include at least one element in each of the following areas:

- Header Content
- Body Content

Section settings

NOT RECOMMENDED except in certain circumstances.

In this area, you can *override just for this page* the **Contact Information** and **Teaser Information** already defined for this site. **Do not enter anything here unless it makes sense to be different.**

For example:

- The contact information needs to be different, e.g. the Science Club page is under the PLMSS division's site but should display contact information for Science Club.
- This page focuses on something unique that should/could be teased separately from the site that it is under, or it is a page with high traffic, e.g. a page about LCMail under the IT site)

Header Content

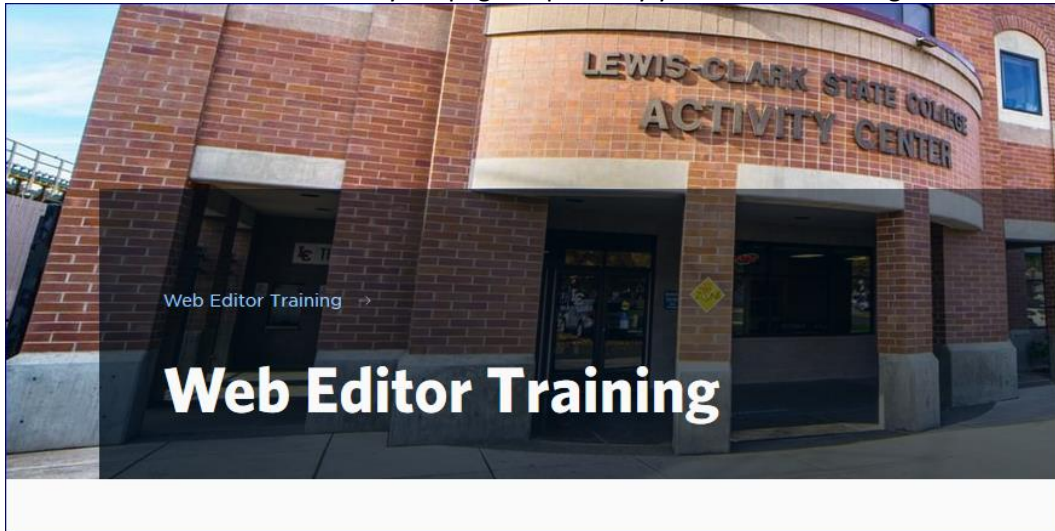
In this area, you can add a full-width headline/page title, image, and list of "calls to action" that will appear at the top of the page, above the main body content. **A header is needed for every page.**

Overall design considerations:

- The lower the level of the page, the more subdued the header should be.
- If your header content will have a headline with background image *and* a call-to-action, the image should go above the call-to-action.
- If your header content will have a headline with no background image but will have a call-to-action, the call-to-action should go above the headline

Page Header

Think of this as the headline for your page. Optionally you can add an image behind the headline.



Rules of thumb:

- Use images only on top level pages (e.g. the home page or one just below it).
- Choose an appropriate image that matches the content.
- You may not use your own images here; you can only use one of the available images that have been approved by Marketing.
- **Alt Text** for images is **required**; make it meaningful for a screen reader (refer back to design standards).
- The higher the page level, the larger the image layout should be.
- The lower the page level, the more boring the page should be (i.e. lower level pages should just have text).
- **Add transparent overlay** will mute the page and can help dial down the image on a lower level page
- **Color overlay accent** will overlay the image with the chosen color; pick wisely and get a second opinion from your partner; if unsure, err on the side of caution and do not add it

Steps:

1. **Content** tab: enter the headline; you do not need to use all 70 characters.
2. **Background** tab: add an image behind the headline.
 1. In the **Media** section, click the **+**.
 2. Click **Image** (optionally you can select Placeholder if you are just scaffolding the page; no input is required; just select it and save).
 3. Click the **+** to select a pre-approved image.
 4. In **Alt Text**, enter a description of what the image shows; **required**.
 5. Click **Done**.

Call-to-Action Button List

This is a horizontal list of primary calls to action, i.e. links to specific pages within your site. Think of these as the top three questions your site visitors have, or the most popular reasons people come to the site. The goal of this list is to save your visitors from having to hunt for this information. Optional.

Learn web design in three easy steps

TRAINING SCHEDULE



EDITOR RESOURCES



Rules of thumb:

- Use only on the home page or a top-level page.
- Do not overuse or your visitors will get lost and overwhelmed.
- Do not nest them indefinitely.
- Do not put them on every page.
- For a good example, see www.hamilton.edu/admissions.

Steps:

1. Enter the **Headline**.
2. **Add** each call-to-action **Link**.

Body Content

In this area, you can add the content that will form the main body of the page. You may choose from many components. You do not need to use all components; only use those that make sense for your content.

Heading

Headings are important for accessibility and for breaking content into easy-to-read chunks. Focus on maintaining proper heading hierarchy. Organizations have been sued over lack of accessibility in websites.

This is the first heading on this page

Rules of thumb:

- Choose from heading levels H2-H6.
- H2 is the highest (largest) heading level.
- Blank defaults to H2.
- Utilize headings in hierarchical order. (Example: [Mayo Clinic Swine Flu](#).)

Lead Paragraph

This is the top paragraph on a page. It conveys essential information and sets the tone. It entices visitors to keep reading; similar to the first paragraph in a newspaper article.

This is a lead paragraph. It should provide essential overview information about this page.

Rules of thumb:

- Not required.

- If used, should be the first paragraph.
- Do not use more than once on a page.
- Do not use just for its style or because you want a paragraph with a larger font.

Rich Text

Use this for all other paragraphs on the page. Take advantage of the rich text editor to style the content: bold, italics, bulleted lists, adding hyperlinks.

This is the first heading on this page

This is just a regular rich text paragraph under heading 2.

Rules of thumb:

- Create a separate Rich Text box for each paragraph. (In other words, to break content into separate paragraphs, do not just add blank lines in here; instead, create separate Rich Text paragraphs.)
- If copying/pasting into here, first paste into Notepad to clear any formatting.

Special instructions for hyperlinks:

- Always include the full path for an external hyperlink, e.g. <http://www.uidaho.edu> or <https://www.p1fcu.org/>.
- To link your page to a Qualtrics form, put the Qualtrics form link here. (Note: you can link to a Qualtrics form anywhere you can add a hyperlink.)
- To link to a downloadable document, use the **Link List** component.
 1. Write the link text, highlight it, and click on the **insert/edit link** icon.
 2. Click **Select media**.
 3. Browse to the folder that contains the desired document.

Media

Use this to add an image to the body of the page. Videos and other media options will be available later. This is also where you can upload your own images. (*Note: images used elsewhere, such as in the teaser or header, must be approved by marketing.*)



In 2019, LC State graduated 634 students.

1. Image

- Choose a picture that matches the content and either provides context or aids in understanding.
 - Do not add images just for stylistic reasons or because you think it looks good.
 - Refer back to the design principles for illustrations.
 - If unsure, err on the side of a campus nature shot.
2. **Alt Text:** **required**; make it meaningful for a screen reader; refer back to design standards

3. **Placeholder:** optional; can use this when scaffolding the page; no input required; just select it and save.
4. **Caption:** optional; describes the photo.
 - Think of a caption on a photo in the newspaper.
 - Should describe who or what is in the image, or what is happening.
 - See www.uw.edu for examples.

Embed

Use this to embed into your page a video from an outside website (so your visitors do not have to go outside of your website to see it). Use case: your department created a [training video](#) and hosts it on YouTube.



How to use:

Obtain the URL or embed code from the site that hosts the video, and paste it here.

1. **URL – do not use. Will result in accessibility errors.**
2. **Embed code:** right-click on a YouTube video, copy the embed code, then paste it here. Full instructions are [listed online](#).

Teaser List

Use this to "tease" other page(s), i.e. to show the "Teaser" information from other pages (usually an image, title and short description.) You can tease your own lower level pages or pages under other sites and sections. Using teasers helps eliminate redundant content.



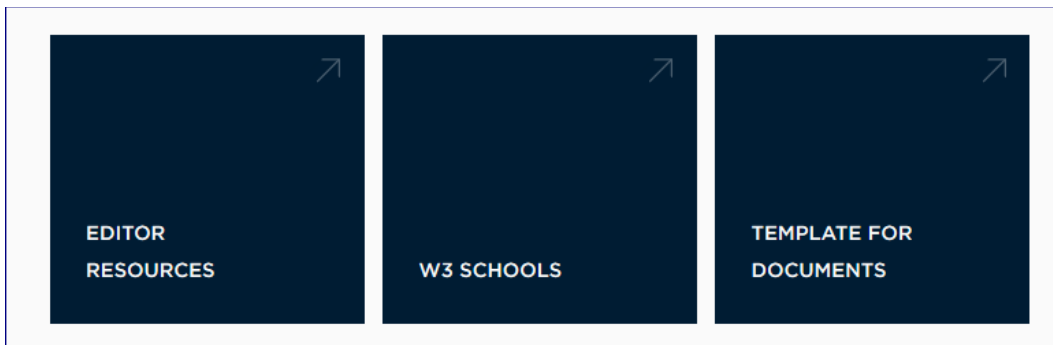
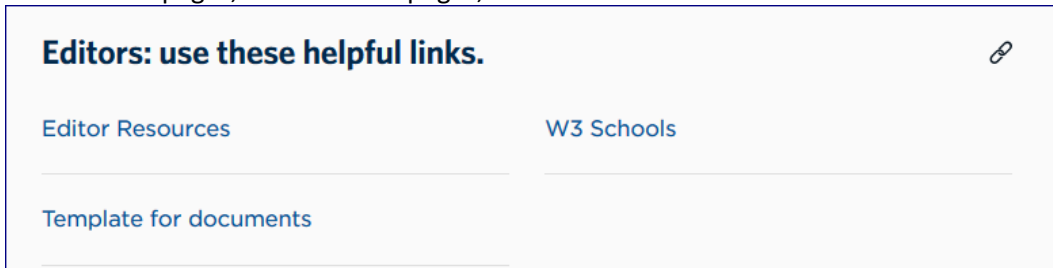
Rules of thumb:

- Do not tease all pages.
- Tease only the most important pages (e.g., pages that 80% of your visitors should be informed of).
- Always preview it after you set it up to make sure it is there and works as desired.

(Note: to tease page, that page must have its teaser information filled out; otherwise, it will tease the next page up in the hierarchy. You can also create your own teaser for the page, but this is not recommended. Instead, contact the editor of that page and ask the editor to fill out the teaser.)

Link List

Use this to create one or more hyperlinks, optionally grouped under a heading. Links can be internal web pages, external web pages, or downloadable files.



1. Content tab

1. Write a descriptive headline/title for the links. Optional. Only applicable for certain layout styles.
2. Choose the heading level (H2-H6). Choose the appropriate level for where this fits within your heading hierarchy.
3. Add links.
 - **Internal:** choose an existing page from anywhere in the entire website.
 - **External:** enter the full URL for an external link (e.g. <https://www.p1fcu.org>, not just www.p1fcu.org).
 - **File:** choose a document or file from the Media section. (*Cannot link to images. Document must be already uploaded through the Media menu.*) When choosing files, you can toggle between display options to see more details or images of each file.
4. Add a **Link Display Name**. This is what visitors will click on.
 - For internal links, this will overwrite the existing display name for the linked page; think carefully before overwriting it.
 - For external links, adding a friendly display name will be helpful to your visitors (otherwise they will only see the URL itself).
 - For forms, add a display name if it should be different from the actual document name.

2. Layout tab

1. Click on the desired layout. Note that the headline will only show with certain layout styles.

Table

Use this to set up a table for organizing tabular data or data that need to be compared.

Green	Yellow	Pink
Tree	Buttercup	Rose
Fern	Dandelion	Rhododendron
Quad	Fountain	Talkington green
This is my table		

Rules of thumb:

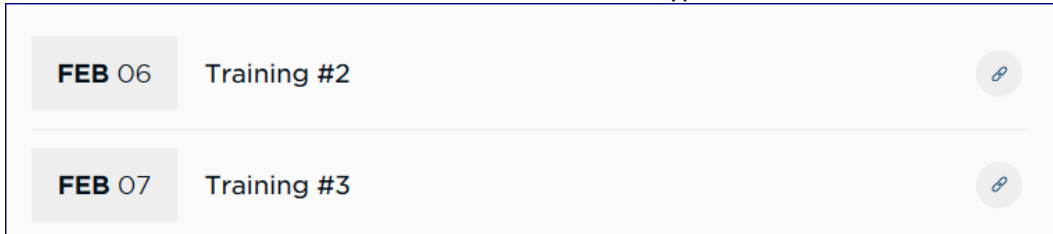
- Use only for tabular data, not for layout or stylistics reasons.
- Practice and preview!

Steps:

1. Enter the desired number of **Columns**.
2. Enter the desired number of **Rows**.
3. Click **Create Table**.
4. Click in a cell to add data.
5. To reorder columns or rows:
 1. click the **REORDER** tab.
 2. Select the row or column to reorder.
 3. Select balloon that corresponds to the new desired location for the row or column.
6. To add or remove a column or row:
 1. Click the **ADD/REMOVE** tab.
 2. REMOVE: Hover over the column or row to remove; click the red X.
 3. ADD: Hover between the row or column where the new one should go; click the + balloon.
7. To add stylistic design to a cell: click the **FORMAT** tab and utilize the design options.
8. To add a caption:
 1. Click the **OPTIONS** tab.
 2. Click **Enable Caption**.
 3. Click **Done**.
 4. Click the **EDIT** tab.
 5. Replace ***EDIT TABLE CAPTION*** with the caption.
9. To add header or footer:
 1. Click the **OPTIONS** tab.
 2. **First row contains column headers**: enabling this will turn the first row into a header.
 3. **First column contains row headers**: enabling this will turn the first column into a header.
 4. **Use last row as table footer**: enabling this will turn the last row into a footer.
10. To add other stylistic designs to the table: click the **OPTIONS** tab and utilize the design options.

Date List

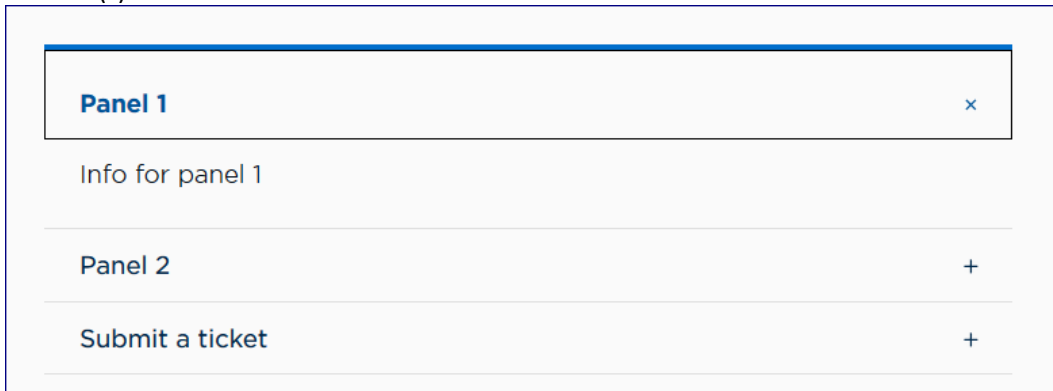
Use when you need to display a list of dates. This is a simple, decorative way to display a list of dates. Each date can also be listed with an associated hyperlink.



1. Click **Add**.
2. Enter a **Date**.
3. Enter a **Description** for the date (**required**).
4. Add a **Link** to associate with the date (optional).
 1. Options include **Internal**, **External** and **File**.
 2. The standard hyperlink rules of thumb apply.
5. Click **Done**.
6. Repeat steps 2-5 for all dates in the list.

Collapsible Panels

Use this to create vertically-expandable sections of content (like an accordion). Intended for related items of non-critical information (e.g. FAQs) to let readers skim the headings and expand the one(s) of interest.



Rules of thumb:

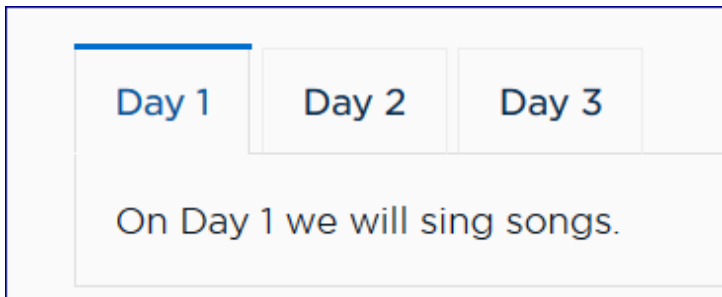
- Do not use just to hide big chunks of content on the page.
- Use for content that a visitor may want to see side-by-side.
- Use for content that needs to be exposed in a progressive manner.
- Allows visitors to control how much they see; minimizes scrolling.
- Can be a better solution than in-page links, which can disrupt a visitor's experience by sending the visitor someplace else.
- Review the section on Tabbed Panels and decide whether Collapsible or Tabbed Panels are best for your content.
- For more suggestions, see <https://www.nngroup.com/articles/accordions-complex-content/>.

Steps:

1. Select a **Heading level of panel titles** (choose from H2-H6). This is what visitors will click on to expand the content. Pick the appropriate heading level for where this set of panels fits within the page hierarchy. This heading level applies to all panels.
2. Click to **Add** a panel.
 1. Enter a **Title** for the panel (**required**).
 2. Enter the panel **Content** (**required**).
 3. Click **Done**.
 4. Repeat for each panel.
3. Go to the **Settings** tab.
 1. **Allow multiple**: this will allow multiple panels to be open at once.
 2. **Open first panel**: this will display the first panel by default.
 3. **Require open panel**: do not allow all panels to be closed at once; by default, opens the first panel.
 4. Click **Done**.

Tabbed Panels

Similar to Collapsible Panels, except the content is behind tabs. Think of using tabs like leafing through index cards. Better for related but separate chunks of information, e.g. when you do not need to see more than one chunk of information at a time.



Rules of thumb:

- Title should not be longer than 2 words
- Do not use ALL CAPS in the title (too hard to read)
- Review the section on Collapsible Panels and decide whether Collapsible or Tabbed Panels are best for your content.

Steps:

1. Select a **Heading level of panel titles** (choose from H2-H6). This is what visitors will click on to see what is below the tab. Pick the appropriate heading level for where this set of panels fits within the page hierarchy. This heading level applies to all panels.
2. Click to **Add** a panel.
 1. Enter a **Title** for the panel (**required**).
 2. Enter the panel **Content** (**required**).
 3. Click **Done**.
 4. Repeat for each panel.

Academic Calendar

This is a special component intended only for use by the Registrar's Office to embed the Academic Calendar. Consult the Registrar's Office before using.

Degree List

Displays a list of degrees. Content is automatically populated from the Degree Finder.

Rule of thumb:

- Drive visitors to our Degree/Program Finder page; don't recreate the information that is already listed elsewhere.

Post-Body Content

Use to add full-width components or content blocks below the body content but above the global site footer. Think of it like a banner at the bottom of the page.

Rules of thumb:

- Do not repeat any information that is already in the global site footer.
- Most of the design components that are available here have already been discussed in this manual; the same guiding design principles apply.

Shareability tab

Use these functions to define the information that displays when someone shares your page on social media. Twitter functions will not be covered in class.

- **Social Image:** choose an image that will be used when others embed/share your page on social media; should be an image that is representative of the page.
- **Social Title:** enter a title that will be used for your page when it is shared on social media.
- **Social Description:** enter a lengthier description.
- **Twitter Card Type:** use the default (unless you're a Twitter expert).
- **Twitter Site Handle:** use if you have your own; otherwise leave it blank and it will default to LC.
- **Twitter Creator Handle:** use if the page should be attributed to a specific group.

Searchability tab

Use these functions to enable your page to be found by search engines. SEO stands for "search engine optimization."

Rules of thumb: <https://www.searchenginewatch.com/2016/05/26/how-to-write-meta-descriptions-for-seo-with-good-and-bad-examples/#checklist>

Steps:

- **Snippet preview:** check this to see how your page will display in Google search results.
- **Focus keyword:** this is the phrase for which you want your page to be ranked high in Google; it does not show up on your page or in the search results the page.
- **SEO title:** this is the first line for your page in search results; see Snippet Preview for example.
- **SEO description:** these are descriptive lines for your page in search results; see Snippet Preview for example.
- **Validation SEO:** will identify anything wrong with the way you configured the SEO tags. (Will only work in Prod; will be covered in more detail in a future workshop.)

Snippet preview	Become a web designer Lewis-Clark State College https://wwwdev.icsc.edu/web-editor-training/home Join our training program and learn web design in three easy steps.
Focus keyword <small>The keyword you want to rank this page for, example: Umbraco editor</small>	<input type="text" value="web design training"/> <i>i</i>
SEO title <small>When left empty the configured SEO title property for the document type will be used</small>	<input type="text" value="Become a web designer"/> 49
SEO description <small>When left empty the configured SEO description property for the document</small>	<input type="text" value="Join our training program and learn web design in three easy steps."/>

- Ignore these functions:
 - Hide from sitemap
 - Robots index
 - Robots follow

Navigation tab

The setting(s) in the navigation tab are optional and will override default settings for the site. Not recommended; consult IT to discuss appropriate scenarios.

- **Menu Title:** this will override the display name of this page throughout the entire website. Could be useful if a department name or function name was changing, and this would change the title without breaking all links to the page.
- **Invisible Redirect:** anyone who clicks on a link to this page will automatically be redirected to the URL listed here. Useful when transitioning to a new page.
- **Hide from Menu:** This will hide the site from all menus, but not from any locations where it has been teased or linked. Consult with IT to discuss appropriate scenarios.

Info tab

This tab primarily contains read-only information. It can also be used to schedule a date to publish or un-publish the page.

Chapter 5: Preview, Save and Publish a page

1. After each edit, click the Save and Publish button to save your changes.
2. To verify the results of each edit, click the Preview button to see what your changes look like.
3. To see how the page would look on the screens of devices of different sizes, select from the choices in the left-hand pane.

Chapter 6: ACTIONS

These are the same options you will see if you right-click on a page. Some of these options will show if you right-click on a section.

- Create - create a new page.
- Delete - delete this page.
- Move - move this page to a different site.
- Copy - make a copy of this page.
- Sort - **Required for a site.** Defines the order of pages in the breadcrumb pane.
- Rollback - restore to backup from a certain point in time.
- Audit Trail
- Publish - publish this page.
- Reload

Appendix 1: Teaser Examples

Lead In: “Be Who you are”

Title: “Beyond the stats”

No Subtitle (rarely used)

Description “all the text”

Primary button link "WATCH KENA'S VIDEO"



Title and Subject “the what” – “Malesardi Quad”

Subtitle - Helps describe (explains more) what is Malesardi Quad – “Explore the heart of campus”

Primary button link - "Take the tour"

Tour the Campus



ENGAGE, PLAY, RELAX

Malesardi Quad

Explore the heart of campus

With its sweeping views of the Susquehanna River Valley and Appalachian Mountains, Malesardi Quad is where Bucknell students have some of their most memorable experiences.

Take the tour →


Lead In: "visit campus"

Title: "discover your future"

No Subtitle (rarely used)

Description "all the text"

Primary button link "Plan your visit"



VISIT CAMPUS

Discover Your Future

Visit Bucknell to experience what it's like to live and learn at this place we call home.

Plan your visit →