[redacted] Onboarding and Training (Simple, Urgent/Off-Hours Requests)

Last updated [redacted]

Table of Contents

Overview of how the CMS works

[redacted] is a content management system that the [redacted] began using in [redacted]. Like any content management system, it is designed to provide a relatively user-friendly interface for adding, removing, or modifying web content.

Our particular build of [redacted] is quite complex and contains many bespoke features built to handle [redacted]-specific activities (e.g. the [redacted]). You should not need to interact with most of these; the most important parts are also the simplest, which will largely resemble working in a text processing application like Word, plus filling out some additional form fields.

Account Maintenance

[redacted] automatically deactivates accounts after a period of [redacted]. Once this happens, the only way to reactivate your account is for someone with administrative access to modify your user account.

To avoid this hurdle for time-sensitive publications, we would recommend logging in to [redacted] at least once every week, if only to trigger a refresh on your active state.

Overview of standard process

Web publishing on [redacted] usually works through [redacted], with all content and tasks reviewed and approved by [redacted]. If a request comes in that can be handled during ordinary business hours, you're encouraged to simply send the request to those mailboxes.

The standard [redacted] publishing process includes the use of standardized web templates to ensure that we publish pages consistently and with all appropriate metadata. This document will assume that, due to necessary or unavoidable changes in process or urgency, you don't have a template to work with, and will thus explain how to derive from what you are given what you need to publish a page correctly.

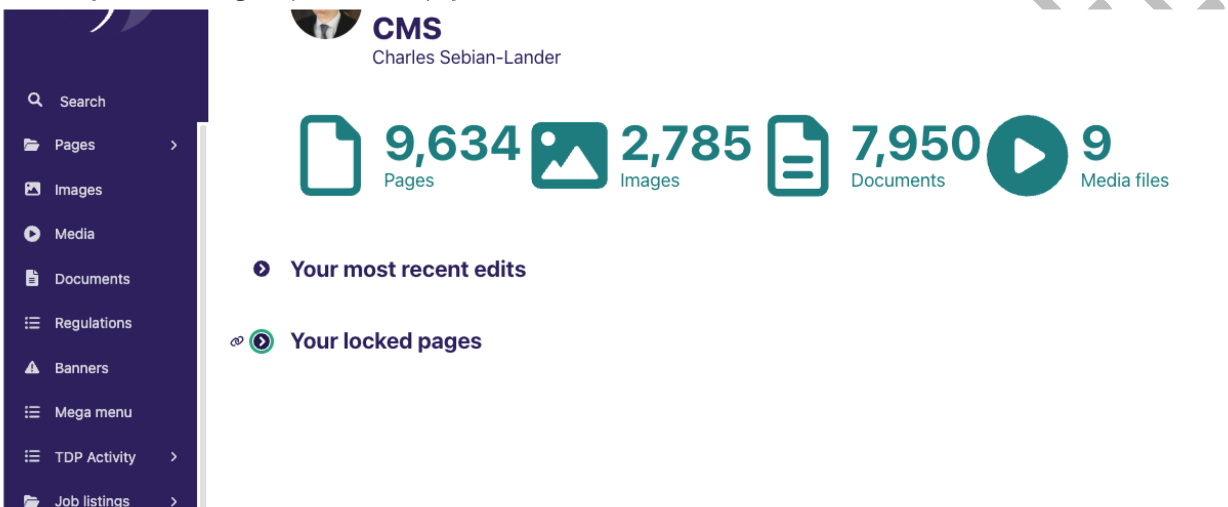
You can find our broader set of how-tos and explanations for content management in the Content Manager's Guide to [redacted]. To find this, log in to [redacted] and select the "Help" option in the left-hand sidebar, then click on "Internal documentation." This should pop up a separate window with the Word document, which has a table of contents you can use to find what you need.

If something is too complicated

Chuck Sebian-Lander is currently the primary/sole manager of [redacted]. If you have a question about how to do something that is not covered in here or in the internal documentation provided in [redacted] (explanation above).

Logging in and finding content

When you first log in (at /admin), you will see the dashboard:



There are two ways to find content, or a particular section of the site, from here. You can use [redacted]'s internal search tools, or you can simply navigate the content version of the site as you would the ordinary site.

To use [redacted]'s internal search, just click into the "Search" field (in the left-hand navigation, above "Pages" and below the [redacted] icon) and type your terms. Hit enter to be taken to the search results page:

[image]

You can refine your search further from here using the field at the top of the page. To select a page for editing, you can simply click on its title in the search results. To see if a page has child pages (e.g. to view the blog posts within the blog), click on the right-arrow icon to the right of that page in the search results.

To edit pages after navigating the [redacted] site, just use the site as you normally would but with the [redacted] domain instead of www. For example, if you want to find the Blog page for editing or adding a new post, you can just navigate to [redacted]/about-us/blog:

[image]

If you've already logged in, you should see a [redacted] icon at the bottom-right of the page. Clicking on this pops up a menu of options:

[image]

"Go to [redacted] admin" will take you to the dashboard; "Show in Explorer" will take you to a view of this page's child pages; "Edit this page" will take you to the editor for this page; "Add a child page" will create a new page within this section (so, clicking it here would allow you to create a new blog post).

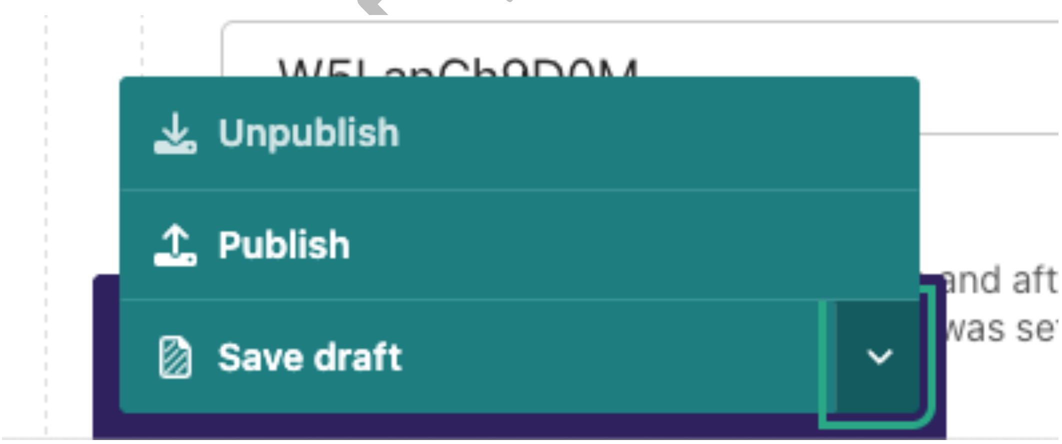
Publishing content

If the content you need to publish has already been staged, find it using one of the methods above. (If the [redacted] previously provided staging link/s for the content, you should be able to use those links directly.)

Confirm that the page has been staged as needed, then enter the editor, which will look like this:

[image]

If you need to make edits to the content that has been staged, you can do so by reviewing and modifying the existing fields. Otherwise, once ready for publishing, go down to the "Save draft" button at the bottom of the page and click the up arrow to the right. A submenu will appear:



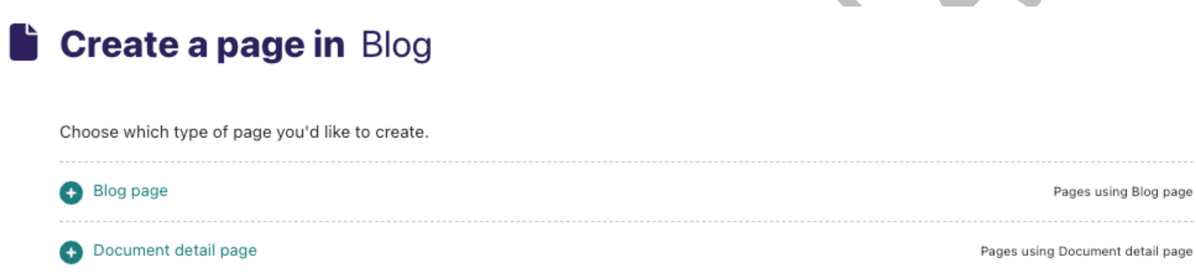
Select "Publish". After a few moments, you will be returned to the page browser with a confirmation at the top of the page that your content has been published.

Creating new content (press release, blog post)

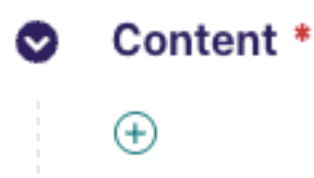
This document will cover the creation of standard releases like press releases and blog posts. A similar process can be followed for other page types but might require different fields or have other complications; just ask Chuck Sebian-Lander if you have concerns or needs about any of this.

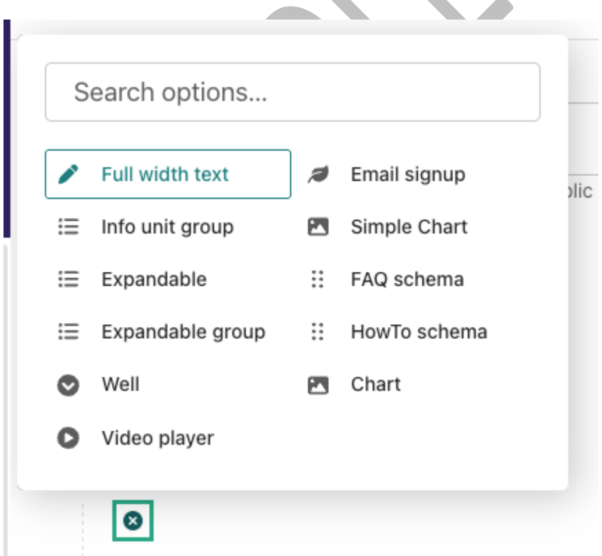
You can start by navigating to either /about-us/blog or /about-us/newsroom depending on what you need to create. From here, click the [redacted] icon at the bottom-right and select "Add a child page".

You will be taken to a "Create a page in Blog/Newsroom" menu. Select "Blog page" or "Newsroom page" respectively:

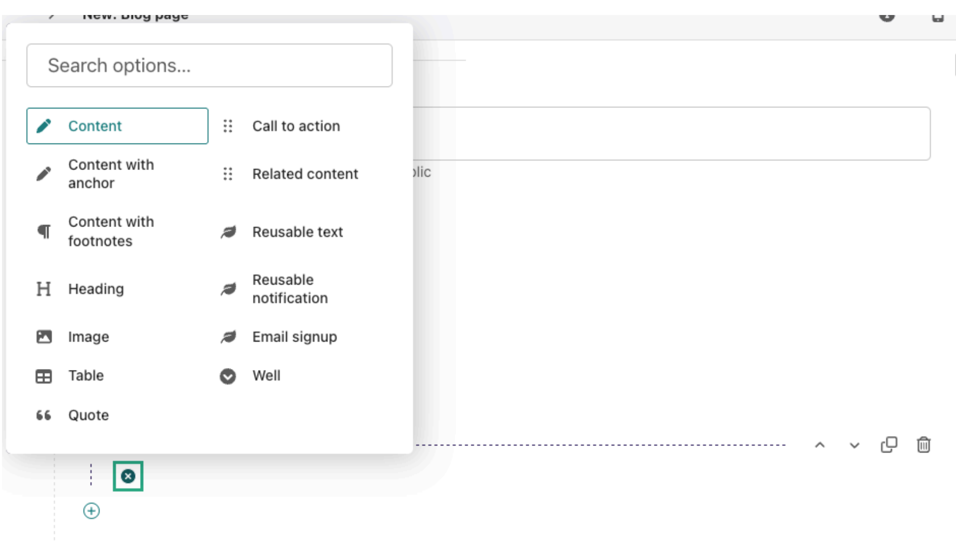


You are now in a blank editor page for your chosen page type. Type in your desired **Page title**. Under Content, click the plus icon and select "Full width text":



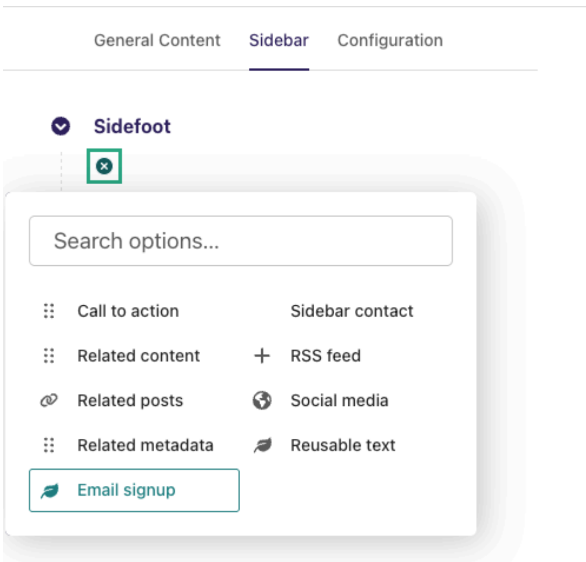


Within the new “Full width text” section that appears, click on the new plus sign and select “Content”:



The “Content” block that appears will resemble a text editor like Word, with formatting options that should look familiar. Any keyboard shortcuts you might use to format text should work here as well. You can copy-paste the content you have been provided here, and then review and clean up the content as needed.

Once the content looks how you need it, click on the “Sidebar” tab at the top of the editor, click the plus sign under “Sidefoot”, and select “Email signup”:



Click on “Choose email sign up”. If you’re creating a blog, select **Blog ([redacted])**; if it’s a press release or other newsroom item, select **Newsroom ([redacted])**. Both of these should be visible on the first page of the selection menu.

Now navigate to the “Configuration” tab.

If you have entered your title, the “Slug” field should now automatically be filled out; this will be what’s used to generate the final URL for your new page. Leave it as is.

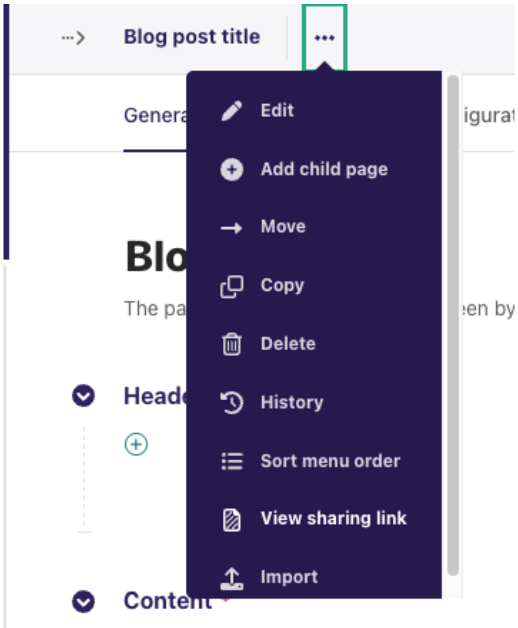
Copy and paste your page title into the “Title tag” field, and take the first sentence or a similarly short segment of your content and paste it into the “Meta description” field. These fields are used both for search engines and to populate the preview content on our Blog and Newsroom listing pages.

If your content has a specific image to be displayed when the page is shared on social media sites, you can upload it directly via the “Social sharing image” field. Otherwise the page will default to displaying the [redacted] logo under such circumstances.

Click on “Add categories” under the “Categories” option and scroll until you find the sub-options for “Blog” or “Newsroom” specifically. In the case of items being published by [redacted] leadership that pertain to [redacted] activities, we’ll generally default to “Press release” newsroom items and “[redacted]” Blog posts.

Add at least one or two topic tags in the “Tags” field; simply type them and existing tags will auto-populate for you to select. At a minimum, these posts should probably include the “[redacted]” tag:

Once all required fields are complete, you can click “Save draft” at the bottom to create a shareable link to your content. To provide this link, you can click on the three dots following the title of your page at the very top of the page, and select the “View sharing link” menu option:



From here you can follow the process described in the previous section to publish your content once it’s final and ready.

PDFs and Files

PDFs and other files can be uploaded via the Documents tab (/admin/documents). Use the “Add a document” link at the top of the page. (You can ignore the “Add to collection” option.)

Before being uploaded, PDFs should be made Section 508-compliant, or else there should be a plan to replace the uploaded PDF as soon as a compliant version can be created.

To **replace** existing documents for this or other reasons, use the “Search…” field at the top left to search for the **file name** of the document to be replaced, click on the document’s Title, and use the “Change document” field on the file page to upload the file. Make sure that the new filename matches the previous one, or else links to the document that already exist on the site may be broken.

Naming conventions

Broadly speaking, files should follow this convention for naming (parts in bold are placeholders depending on the specifics of your file):

- Lowercase only

- No spaces – use dashes and underscores
- General filename structure: [redacted]**_general-topic _specific-file-name_20YY-MM**

Having both the “general” and “specific” parts of the filename is optional depending on whether it makes sense for the file, e.g. enforcement actions will always have this, by virtue of the case name and the specific file type.
There are instances where files should not include dates because they are evergreen, e.g. [redacted].
When in doubt, use recent precedent (i.e. similar documents uploaded in the past 2-3 years).

Common Errors

Mostly due to unavoidable issues with how [redacted]’s authentication interacts with the [redacted] process, you may run into one of these issues while working on content:

[redacted].js

Sometimes, instead of loading your chosen content.[redacted] page, you will instead see a plaintext page with a URL such as “[redacted].js”. Simply re-enter and load the URL you were trying to find and it should work fine.

“Server error”

While editing a page and attempting to select certain options, you may find that the option does not work or that you are given a “Server error” message. If this happens, **save your draft immediately.** The editor should work properly again after refreshing.