

AEM Self-Serve Author Model

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6/20/2017

Agenda

- **Objective**
 - Why are we here?
- **Terminology**
 - Self-Serve Levels
- **Current State:**
 - Sections & Authors
 - Authors' Feedback
 - Demo
- **Future State:**
 - Criteria
 - Potential Self-Serve Areas
- **Next Steps**
- **Feedback & Questions**

Meeting Objective

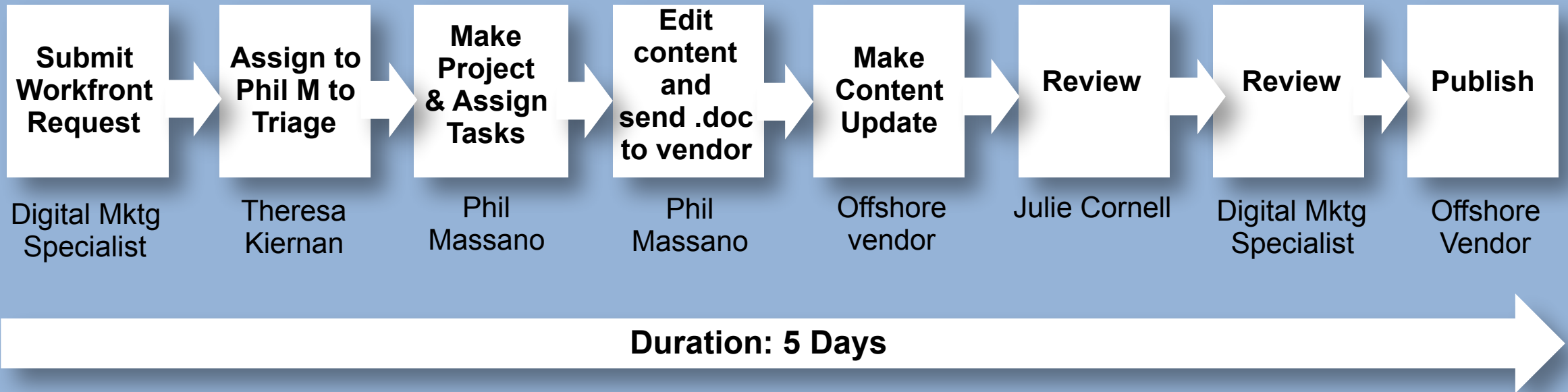
- **Common understanding:**
 - What is Self-Serve Authoring.
 - What areas on our website are Self-Serve today.
- **Use MMT as negotiates to gain agreement on:**
 - Criteria used to determine candidates for Self-Serve.
 - Potential future sections to consider utilizing Self-Serve Authoring (which will require further research.)

Why are we here?

- Empower Business Owners to complete their work more efficiently.
 - Eliminate unnecessary steps and get changes made to the site faster.
 - Lots of Opportunity
 - **2,177** Workfront Projects Completed/In Process from Jan 2016 – March 2017 (15 months)
 - **1,022** are “Update Existing Web Page” (47%)
 - **23 Project Sponsors** requested 45% of all Projects (995 projects =>20 each)
- Agree what areas of the site could be good candidates to become Self-Serve to increase overall efficiency and which are not.
- Not here to make everything Self-Serve.

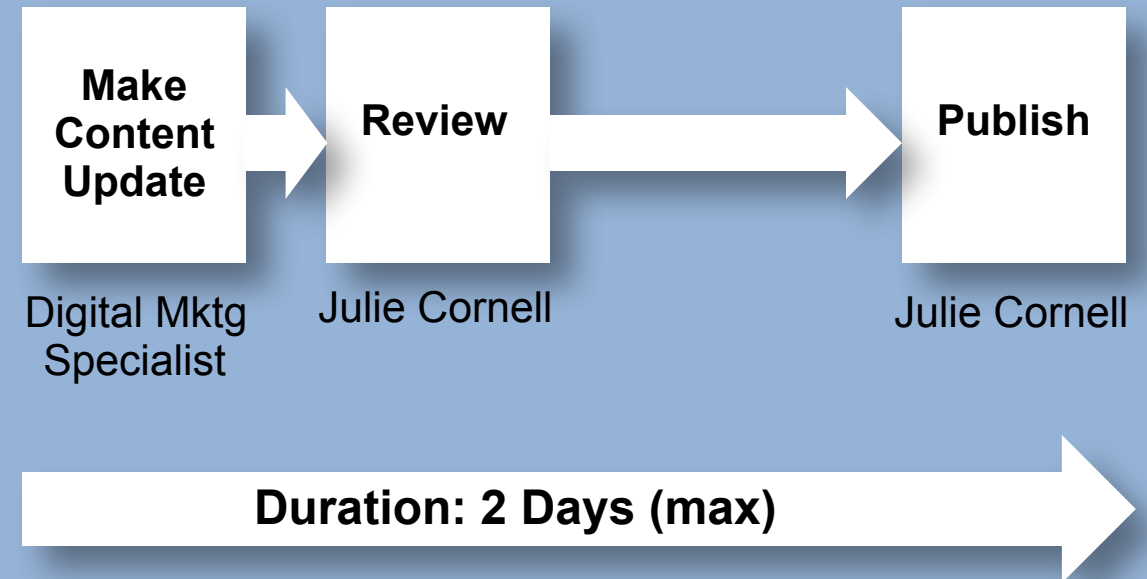
Why are we here?

Current Project: Update to JP PIP Discovery Page



Why are we here?

Current Project: Update to JP PIP Discovery Page



Terminology

- **Adobe Experience Manager (AEM)**
 - AEM Sites (Web Pages)
 - AEM Assets (Images, PDFs...)
 - Components
 - Templates
 - Workflows

Template

Component

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More specifically, *Technical Programming in MATLAB* includes 12 chapters that cover the MATLAB desktop and workspace, matrices, multidimensional arrays, digital images, variables, data types and operators, conditionals and loops, MATLAB files, sorting algorithms, and the user interface.

MATLAB is used to solve examples in the book.

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About This Book
Dursun Akaslan, Harran University
Sezai Taskin, Celal Bayar University
PAPATYA YAYINCILIK EĞİTİM AŞ, 2015
ISBN: 978-605-4220-84-7
Language: Turkish

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Self-Serve Levels


- ***Level 1: Contributor***

- Can only edit existing pages and upload/update assets, add metadata.
- Cannot publish pages and assets.
- Cannot delete pages.
 - More experienced authors will be reviewing the content to publish and/or delete.

- ***Level 2: Self-Serve Author***

- Can create new pages and edit existing pages.
- Can publish pages and assets.
- Onward (offshore vendor) & WebOps Team members are available as an escalation point.

Phased Approach



Phase 1 Monitor Quality

- WebOps gives individuals **“Level 1: Contributor”** access and trains them.
- Contributors start updating content.
- More experienced authors review content for quality and publish.



Phase 2

If no quality issues during Phase 1, allow authors to create and publish pages.

- WebOps meets with Business to gather requirements, design and develop template(s).
- WebOps changes contributors access to **“Level 2: Self-Serve Author”** and trains them.
- Self-Serve Authors start creating pages, updating and publishing content.
- WebOps continue to monitor quality.

Current Self-Serve Areas & Authors

Area	Users with Level 2: Self-Serve Author Access
Books	<i>Naomi Fernandes, Mikiko Hirano</i>
Connection	<i>Dana Wright, Gary Bourdon, Hikari Amano, Tina McKay</i>
Press Releases	<i>Deb Pacella, Sriya Kodial</i>
Training	<i>Elissa Petrelli, Melissa Berkov, Michael Abel, Rachael Tearle, Uday Kadaboina</i>
Technical Articles	<i>Alex Pollack, Linda Webb</i>
Recorded Webinars	<i>Andy Cedrone, Caitlin Howe, Sonja Kent, Molly Coyle (new hire)</i>
*Seminars and Webinars	<i>Andy Cedrone and a subset of the Mktg Operations Team including: Caitlin Howe, Mary Holland, Molly Coyle, Ryan Malone, Sonja Kent</i> <small>*Note: This area is not in AEM currently, it is in Eloqua, but it's still self-serve. As part of the process Andy Cedrone still needs to make an update in AEM for the event listings.</small>
Tradeshows	<i>Andy Cedrone and a subset of the Mktg Operations Team including: Alle Perry, Francesca Habeeb, Kristen Wilkinson, Lauren Foisy, Nicole Accardi, Nicole Catatao</i>

Self-Serve Authors' Feedback – Pluses

Interviewees: Dana W., Alex P., Naomi F., Andy C., Katie A.

- **Easy to use** – AEM is easy to use, intuitive and much better than the old CMS.
- **Provides control over turnaround time** – Being able to create and update pages on our own schedule is great, enables us to expedite the requests as needed.
- **Easy to monitor** – Ability to publish pages and assets ourselves vs. waiting for it to be done is more efficient and a lot easier to review and capture problems quickly.
- **WebOps did a great job!** – They were great! Continue to provide support and a dedicated escalation point of contact.

Self-Serve Authors' Feedback – Deltas

Interviewees: Dana W., Alex P., Naomi F., Andy C., Katie A.

- **Difficult to search & find** – Difficult to search and find content in AEM compared to the old CMS.
- **Minor bugs increase overall time spent** – Minor issues add up and increase overall time spent to create and update pages in AEM.
- **Change of workflow and loss of existing automated functionality** – Some workflow steps were done automatically in the old CMS and now they are being done manually in AEM.

Demo

by Ryan Tremblay

(5-10 min.)

[Demo Page](#)

Level 1: Contributor Training

AEM Sites Walkthrough (30 min)

- How to Find a Page (via Taxonomy and Search)
- How to Edit a Page
- How to Add/Edit Basic AEM Components
- How to View and Edit Page Properties
- How to Send a Page URL to Business Owners for Review

AEM Assets Walkthrough (30 min)

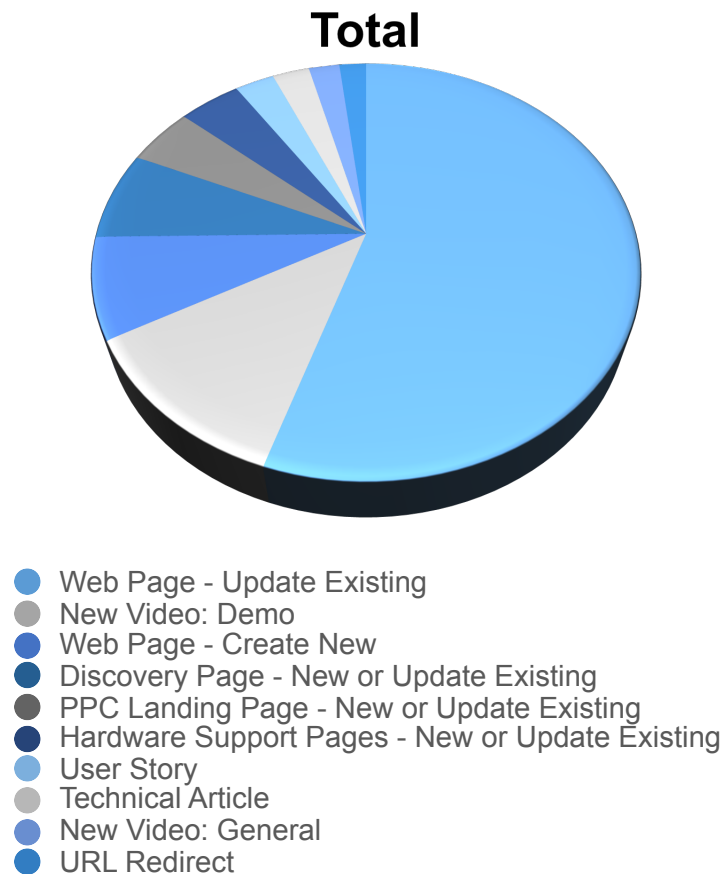
- AEM Assets UI, Switching Views and Navigation
- How to Search and Edit an Asset
- How to Upload an Asset
- How to View and Edit Asset Properties
- How to Send an Asset URL to Business Owners for Review

Criteria for Self-Serve Eligibility

Criteria	Measure
1. Frequently Requested	✓ Frequency of total number of projects/ per quarter is equal or greater than 10
2. Non-Complex	<ul style="list-style-type: none"> ✓ Min. page/asset URL change ✓ Min. page/asset deletion ✓ Min. redirect setup ✓ No query run ✓ No translation ✓ No updates to translated content ✓ Structured page layout
3. Min. Involvement of Multiple Groups OR other groups work is completed prior to AEM page update	<ul style="list-style-type: none"> ✓ Min. approval other than sponsor ✓ No legal review ✓ No design/UX
4. Increased Efficiency	<ul style="list-style-type: none"> ✓ Less time spent updating content than creating and managing Workfront projects ✓ Easier for SME to make content updates ✓ The content is generated in local offices by native speakers
5. Min. Number of Authors	✓ The total number of authors is equal or less than 5
6. Business is interested	✓ Business shows interest for their area to become self-serve

Project Type Frequency:

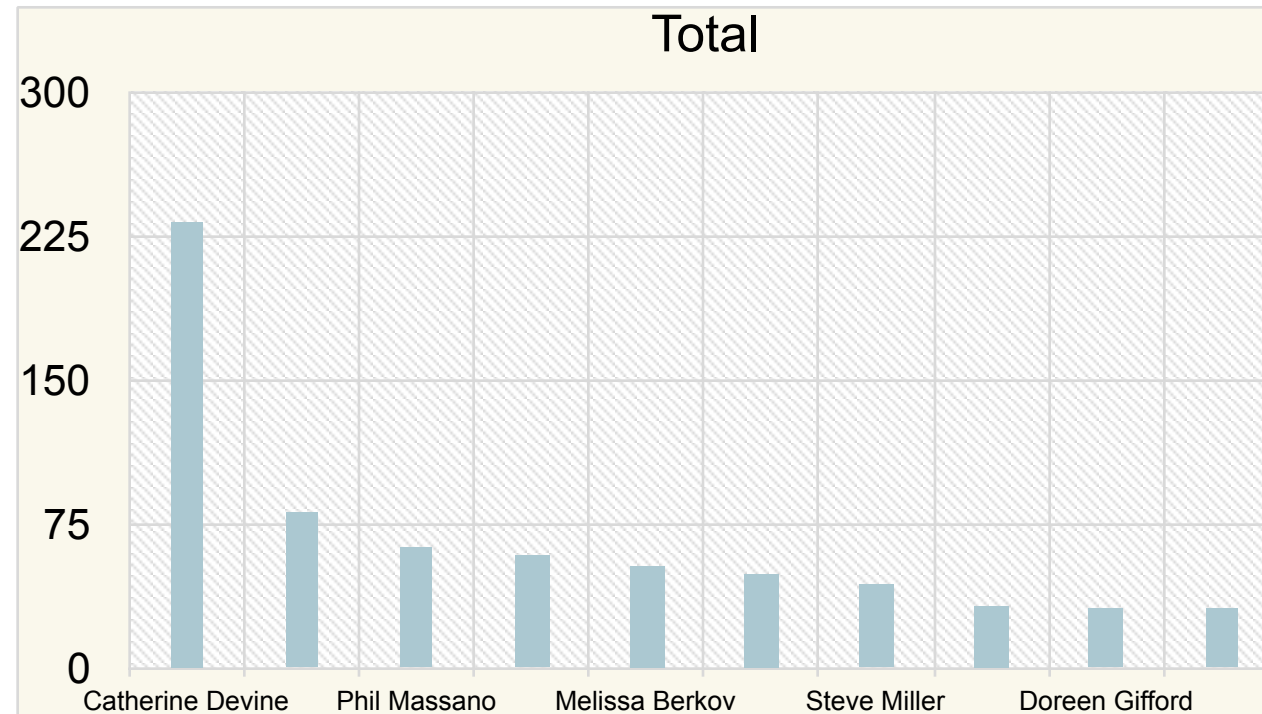
Top 10 Workfront Project Requests *by Project Types*



Project Types		Total
#1	Web Page – Update Existing	1022
#2	New Video: Demo	221
#3	Web Page – Create New	144
#4	Discovery Page – New/Update Existing	128
#5	PPC Landing Page – New/Update Existing	86
#6	HS Pages – New/Update Existing	80
#7	User Story	51
#8	Technical Article	48
#9	New Video: General	40
#10	URL Redirect	35

Project Frequency: Top 10 Workfront Project Requests *by Project Sponsors*

Total



Project Sponsor		Total
#1	Catherine Devine – Policies & Guidelines - Patents	232
#2	Linda Webb – Conf. Papers, News & Notes, Newsletter/Digest, Tech. Articles	82
#3	Phil Massano – Discovery, Offer Landing, PPC Landing	64
#4	Sarah Steele – Student Competitions	59
#5	Melissa Berkov – TAH Portals	54
#6	Alan Poon – User Story	49
#7	Steve Miller – Product Release, New Video: Demo, Product	44
#8	Jack Erickson – HS, New Videos: Demo, Prod., Prod. Overview, Discovery	33
#9	Doreen Gifford – Consulting, Spotlight	32
#10	Shwetha Mallikarju – HS, New Video: Demo, Product	32

Potential Future Self-Serve Areas

Priority	In Process Self-Serve Areas	AEM Page Template	Targeted Start	Level 1 Contributor	Level 2 Self-Serve Author	Status
#1	TAH Portals	July	Aug.	Yes	No	Template Design - In Process
#2	Seminars and Webinars	July	Aug.	Yes	Yes	Moving to AEM - In Process
#3	PPC and Discovery Pages	July	Aug.	Yes	Yes, later	Template Design Needed – July 22
#4	Student Competitions	TBD	TBD	Yes	No	Training - July 14
Priority	Candidates for Future Self-Serve – Requires further research	AEM Page Template	Targeted Start	Level 1 Contributor	Level 2 Self-Serve Author	Criteria Considerations
#1	Legal Patents Page	NA	TBD	Yes	No	
#2	Hardware Detailed Pages	Templated	TBD	Yes	No	Business Interest TBD
#3	Media Coverage	TBD	TBD	Yes	No	Business Interest TBD
#4	Consulting	Aug.	TBD	Yes	No	
#5	User Stories	Templated	TBD	Yes	No	No Business Interest
#6	Product Main, Features, What's New	TBD	TBD	Yes	No	Less Frequency, Many Authors, Inefficient, Maybe Complex
#7	Product Video Pages, Webinar Page, Code Examples	TBD	TBD	Yes	No	Less Frequency, Many Authors, Inefficient, Maybe Complex
#8	Solution Pages	TBD	TBD	Yes	No	Less Frequency, Many Authors, Inefficient, Maybe Complex, No Business Interest

Next Steps

- Continue with 'In Process' site-sections.
- Gather feedback from MMT:
 - Evaluate proposed candidate site-sections
 - Research additional site-sections based on feedback
 - Meet with Business Owners

Feedback & Questions

1. *Criteria*
2. *Future Self-serve areas*
3. *Next Steps*