SDL TRIDION 2013 USER MANUAL

University of Massachusetts Lowell

Learning with Purpose

Inline Editing: Edit existing page and create a new page.

This training allows maintaining the existing pages and creating new ones using SDL Tridion. You will learn how to Log into SDL Tridion, make text changes, make new pages, make a link, add images, insert or edit a table, upload documents, and send work for approval.

Table of Contents

Browsers

Tridion SiteEdit is compatible with all the browsers, however it is recommended to use Firefox.

Pop-ups blocker should be set to allow tcm pages to open.
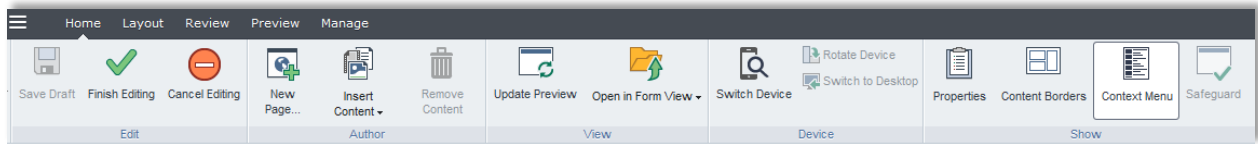
Log-in

Navigate to the page to edit, and delete **www** and replace it with **https://stage** and click enter. You may want to bookmark this page for future editing.

Click the SDL Tridion button

SDL Tridion

In the logging window enter UML email address and password.

Once the logging is successful, the ribbon toolbar appears, set to the Home tab.

Editing existing page

Click on the content to see the border, and borders appear around editable pieces.

If the ribbon toolbar can be seen, but not the contents of the Web page, the browser may be preventing the content from being displayed because it does not consider the content secure. If this happens, do the following:

- In Google Chrome, click the shield icon at the right hand side of your address bar and select **Load anyway**.
- In Mozilla Firefox, click the shield icon on the left hand side of the browser address bar and select **Disable Protection on This Page**.
- In Internet Explorer, a message appears on the bottom of the Web page: "Only secure content is displayed." Select **Show all content** next to the message.

Tridion Experience Manager draws borders around editable areas in the web page (see image below)
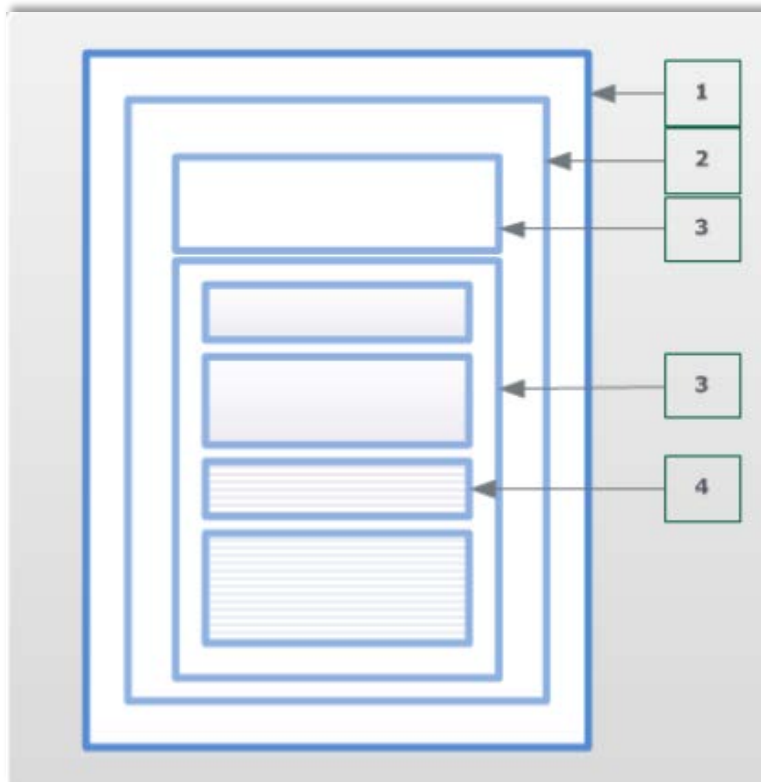
Web page (1)
If the Web page as a whole is editable, Experience Manager draws a border around it.
By default, you only see it when hovering over the edge of the page, but you can make it always visible.

Component (2)
If a Component on the Web page is editable, Experience Manager draws a border around it. By default, you only see the border when hovering over the Component, but you can make it always visible.

Field (3)
If a field of a Component is editable, Experience Manager draws a border around it, but only if you select the Component first and then hover over the field. This also goes for fields within fields (4).

Borders and colors

The color of an item border tells you something about the status of that item.
By default, an item can have a border in one of the following colors:

Blue
A blue border indicates that you can edit the item.

Green
A green border means that there are pending changes to this item for you to commit or discard.

Red
A red border means that your changes cannot be saved, because the content you entered is invalid or incomplete.

Grey
A grey border means that you cannot (currently) edit this item.

These colors are defaults. Your application administrator may have changed them.
The color of borders around the fields of a Component are as follows:
- If the Component has a blue or green border (or its configured alternative), so do all of its fields.
- If the Component has a grey border (or its configured alternative), its fields have no borders.
- If the Component has a red border (or its configured alternative), the field or fields that are invalid also have a red border.

Auto save is enabled, there is no need to save changes that is why the Save Draft function is grayed out
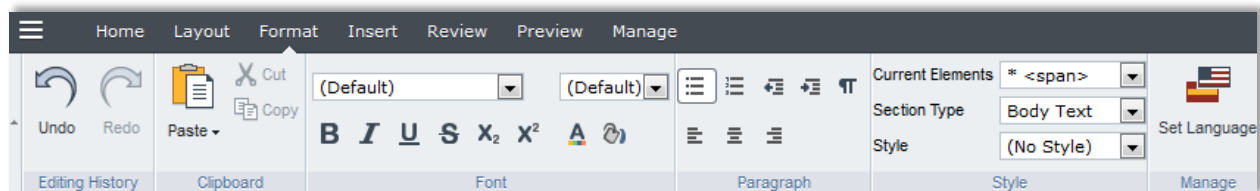
Fonts

For design purposes, the font style and the color are not to be changed.

If the content is prepared in a Word document, copy and paste to Notepad or other text editor first then copy from Notepad to your page. To format the content you can use Text Field Properties or the formatting toolbar.
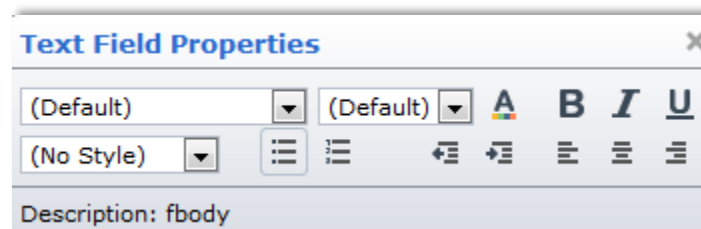

Text Field Properties

Formatting Tool bar

The first title in the component is always heading 2 by default. The green title formatting will be discussed in the creation of a new page.

Heading

Only heading 2 and heading 3 are used in editing content in Tridion. To apply a header to a content box, highlight the words you want in the headline and select heading 2 or heading 3 from **Section Type** in the formatting tool bar. Or just place the cursor in the line that needs the header change and select an option (2 or 3 only) from the dropdown menu.
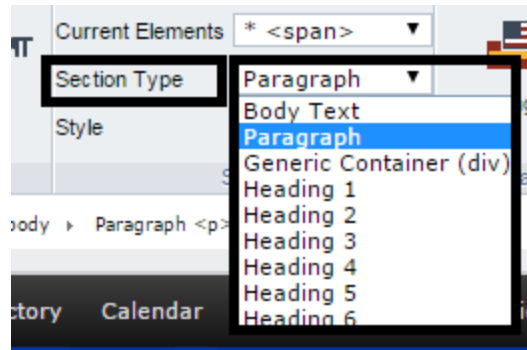
Example of heading 2

Title 2 to be heading 2

Example of heading 3

Title 3 to be heading 3

Email Link

To link to an email address, highlight the content you wish to link (it is preferable to type the whole email address), in the ribbon tool bar select **Insert** tab
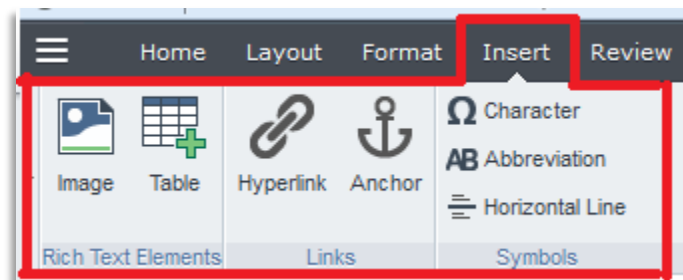
Then click **Hyperlink.**

Now under **Type** field select **mailto,** in the **URL** field after **mailto**:(**no space**) type the appropriate email address, and in the **Title** field add a description of the email (or the person's name), then click **OK.**

Insert Hyperlink

Type:	mailto:
URL:	mailto:First_Last@uml.edu
Title:	Title of this person
Target:	Default

OK   Cancel
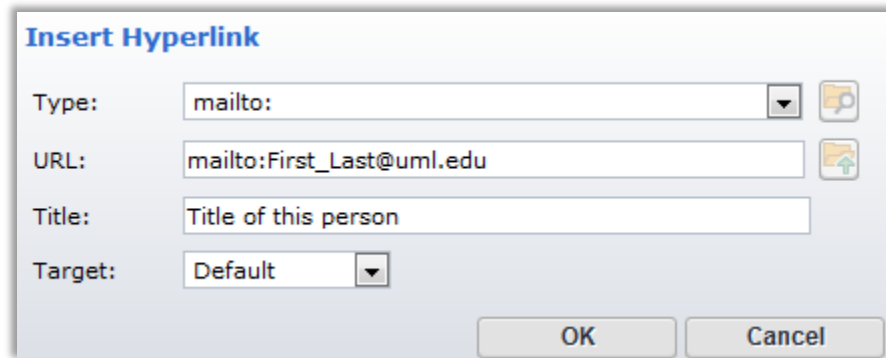
Add an Image

Click at the beginning of the paragraph when you want to insert the image.

Located in the historic industri
than 125 acres along the Merri
backgrounds pursue bachelor's
the arts, humanities and scier

Select the **Insert** tab in the formatting toolbar

Home   Layout   Format   **Insert**   Review

Image   Table   Hyperlink   Anchor   Ω Character   AB Abbreviation   ⯮ Horizontal Line

Rich Text Elements   Links   Symbols

Then click **Image** button

Image

After the **Image** pop up window is displayed

A window slide on the left will display the folder **Building Blocks**, click on the arrow.
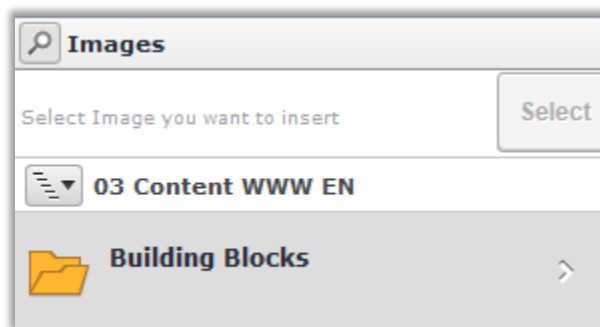
Then click **Content.**

Navigate to the desired folder within your department folders.

Go to **Multimedia** folder.
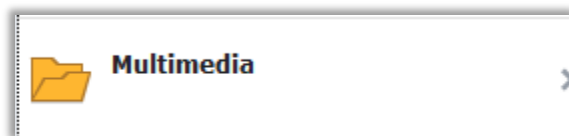
Click **Images** folder.

Select the image you want to insert.
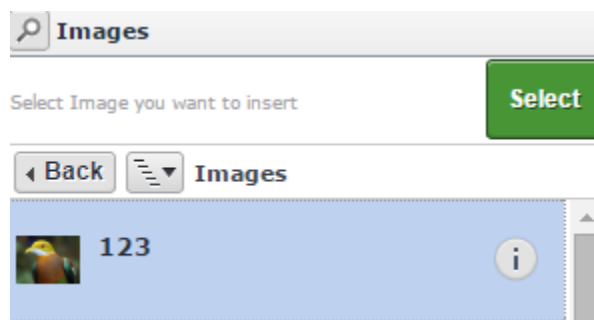
And click **Select** on the top of the slide window.

Click **Advanced** to format the image.

- In the **Text** field type a good description of the image
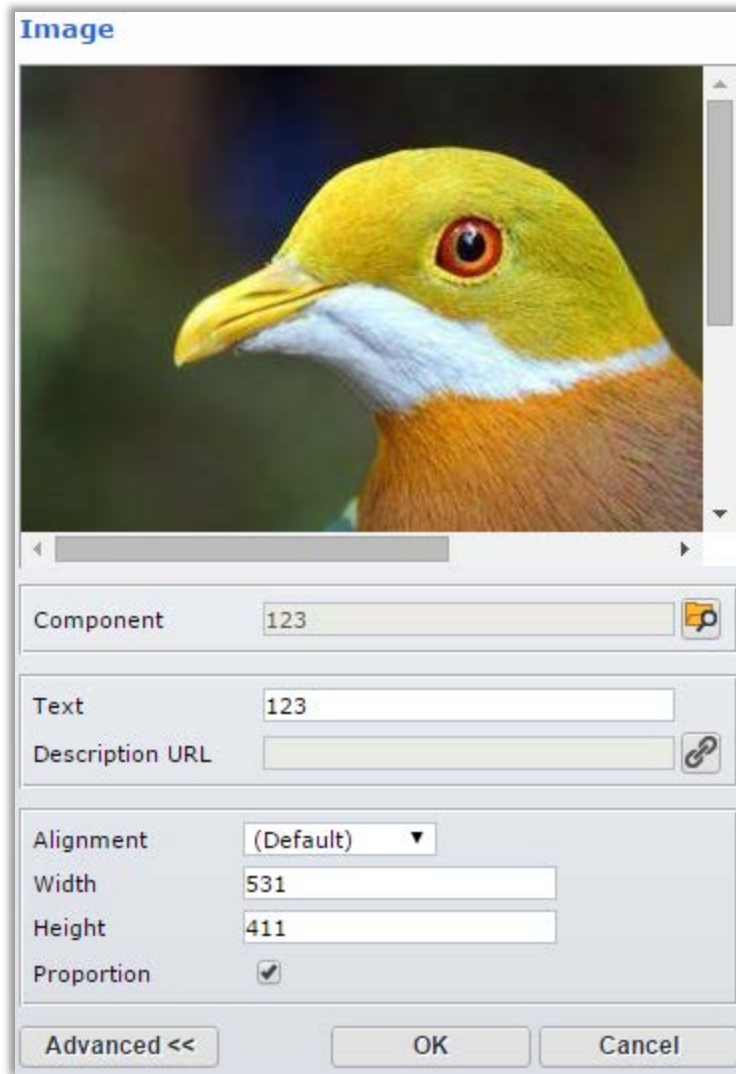
- In the Alignment field select the desired location (mostly float left or float right)
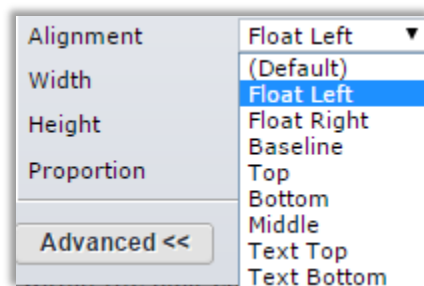
- The maximum Width should not exceed 200
- The maximum Height should not exceed 200
- Keep the Proportion field checked
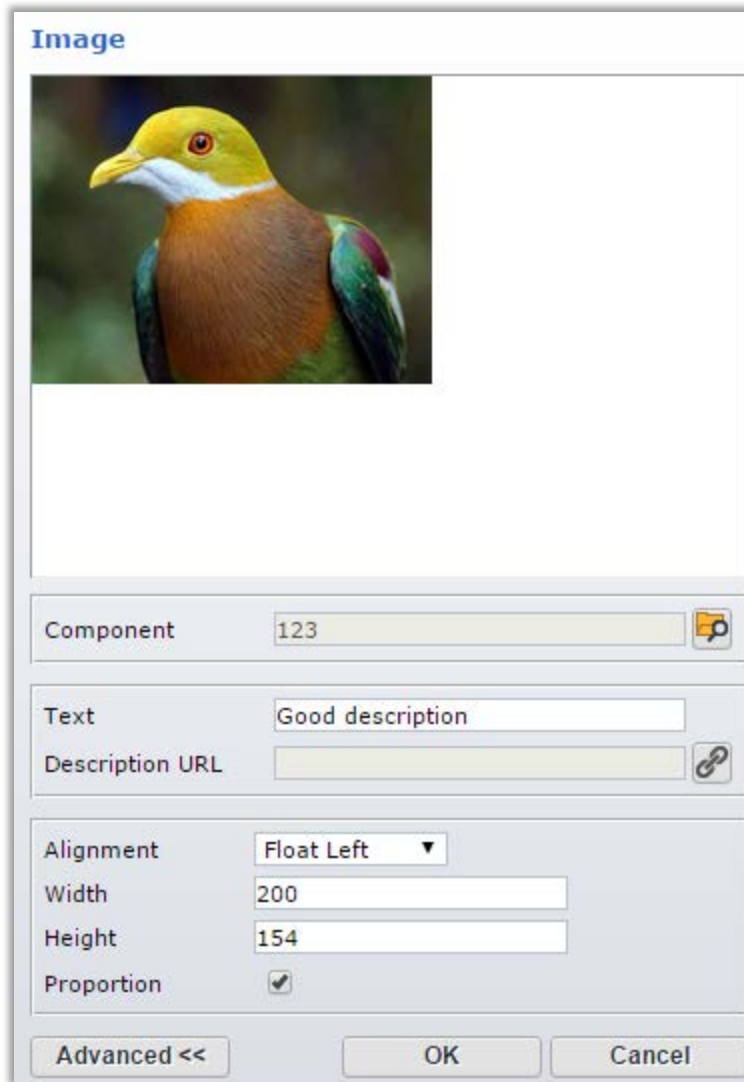
Then click **OK**.

Upload an Image

To upload an image to be added to the page, follow the same procedure to add an image until the step where Image folder is opened.

Click at the beginning of the paragraph when you want to insert the image.
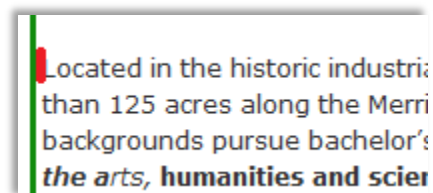
Select the **Insert** tab in the formatting toolbar.
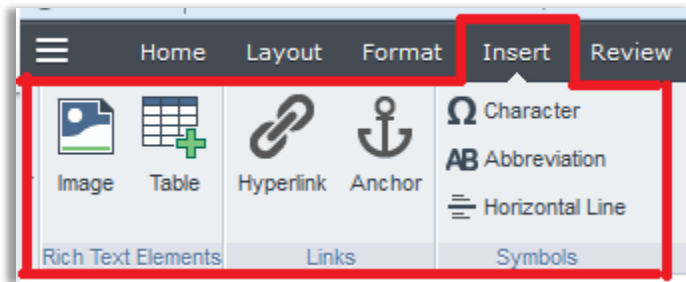
Then click **Image** button.

After the **Image** pop up window is displayed.
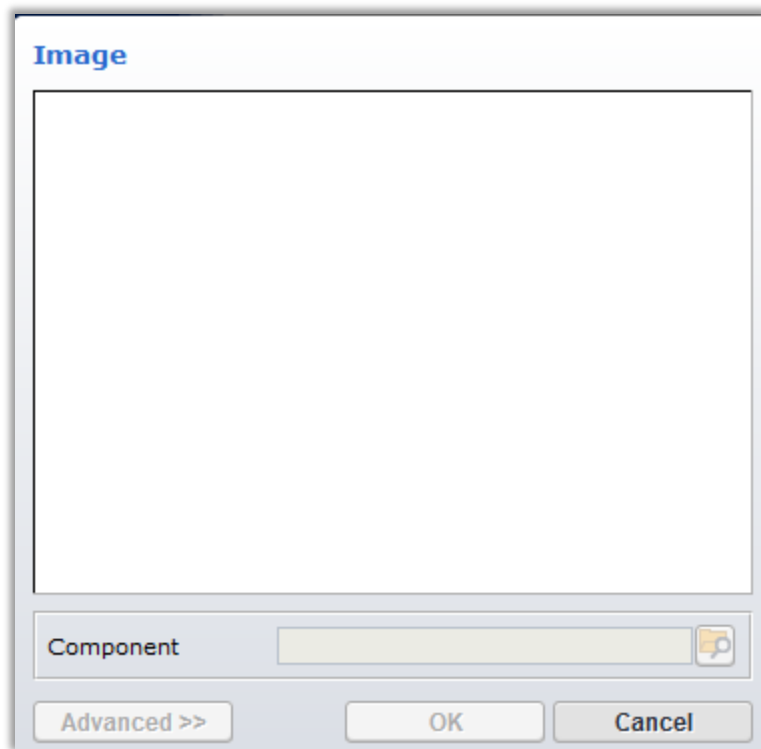
A window slide on the left will display the root folder **Building Blocks**, click on the arrow.
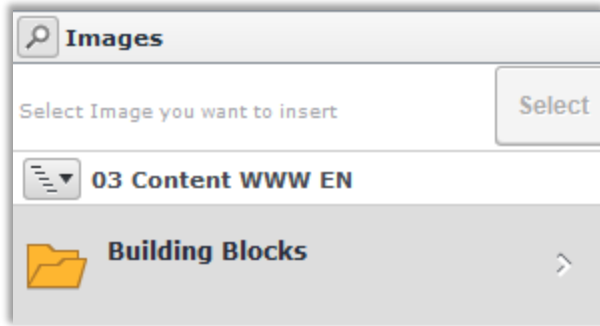
Then click **Content.**
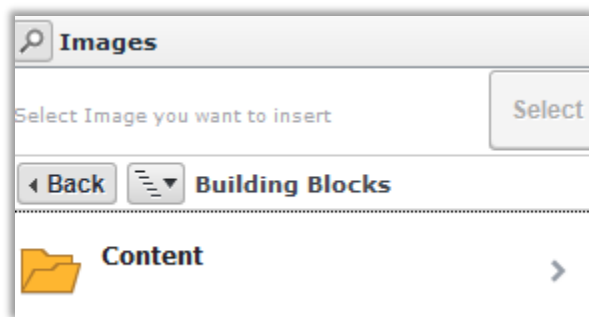

Navigate to the desired folder in your department.

Go to **Multimedia** folder.
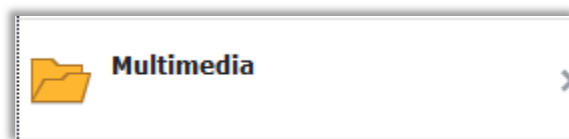
Click **Images** folder.

At the bottom you will find the area where you have an option to drag and drop or upload the image.
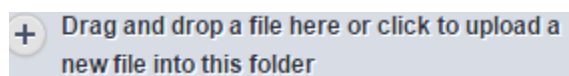
Drag and drop is straight forward.

Click to upload will prompt a new window, which will allow you access to your computer or shared drive or USB drive
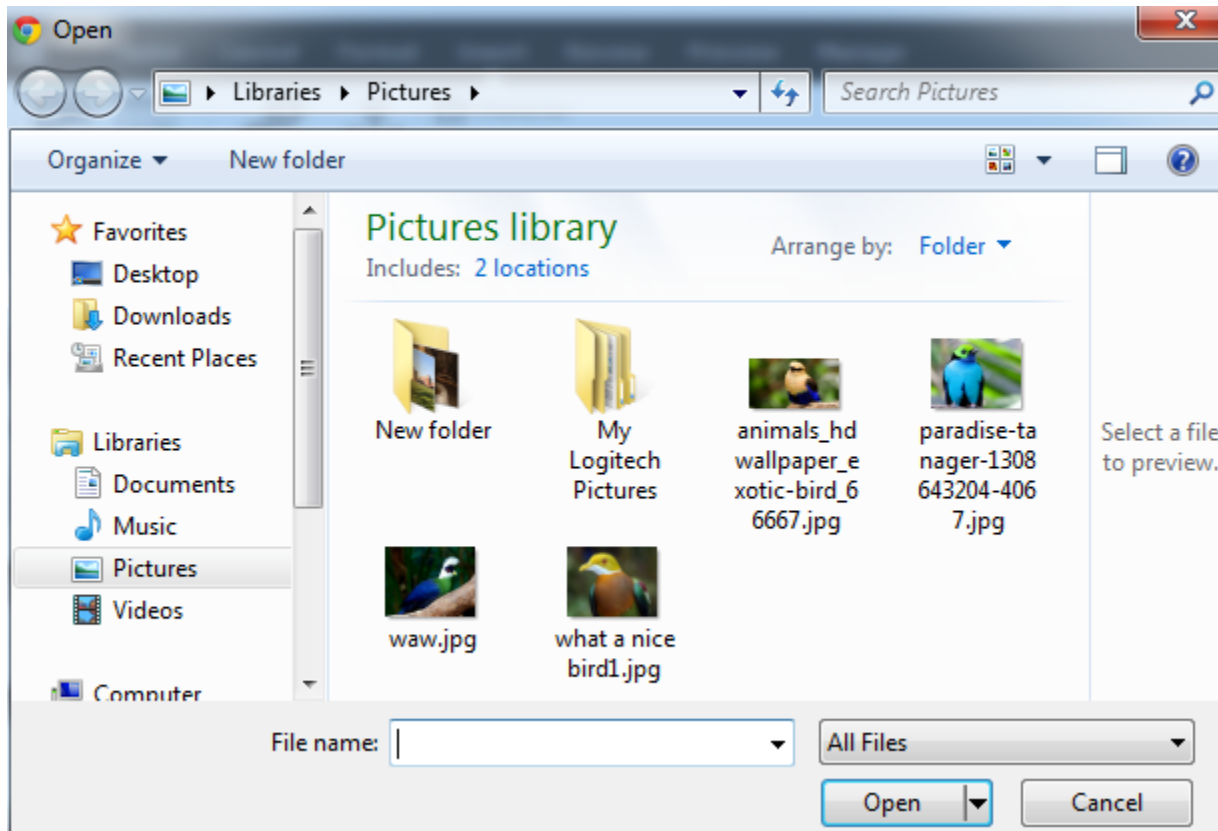
Find the image you want to use, select then click **Open**.

The Metadata window is open to edit the image's alt text.

Metadata

* Image alt text:

UMass Lowell Image

Image width:

Image height:

Save and Close   Cancel

Make it a good description, then click **Save and Close**

After this step click cancel, click outside the component, then click back inside it.

Follow the instructions in "Add an image "paragraph.

Link to pdf, Word doc, Excel, PowerPoint

Type the name of the text file you want to add to your page, and add the extension in parentheses in the format below: File name (file extension).
For example: Test 1(pdf), or test 2 (doc) …

pdf file (pdf) highlight the name of the file but not the parenthesis.

In the ribbon toolbar select **Insert** tab.
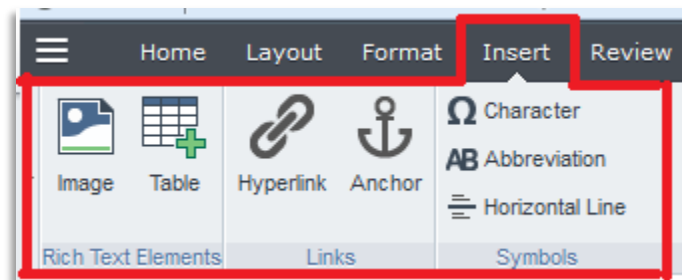
Then click **Hyperlink.**
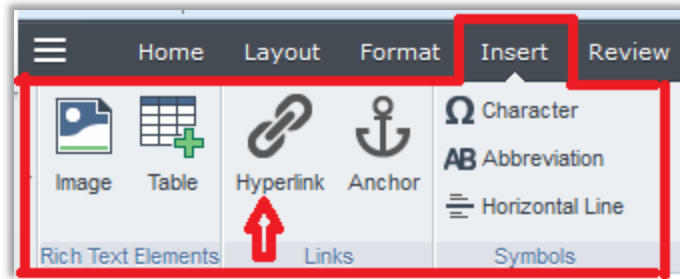
In the following popup window select **Component** for **Type** and **New Window** for **Target**.
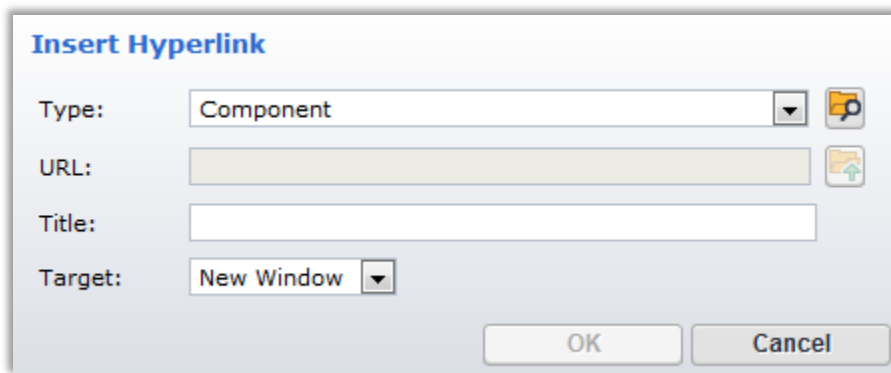
Click browse button.

A window slide on the left will display the **Building Blocks** folder, click on the arrow.
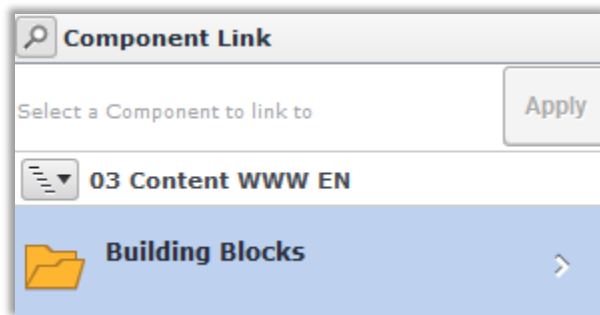
Then click **Content** and navigate to the desired folder.
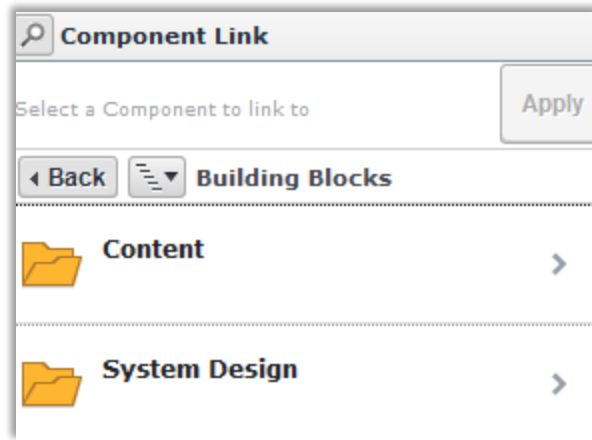
Inside the desired folder click to navigate to **docs** folder where all the pdf, word documents and excel files are stored.

Click on this folder, and locate the file you want to use.
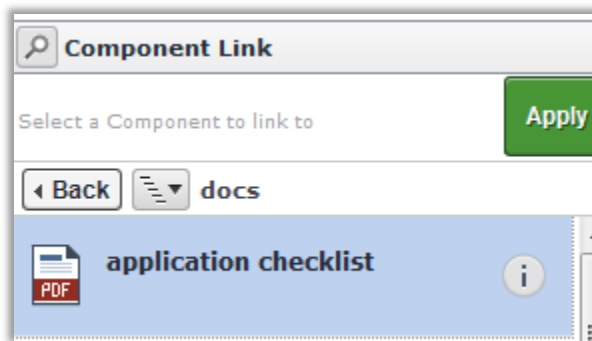
Then click **Apply.**
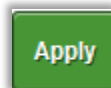
In the Hyperlink window, click **OK.**

Upload a pdf, Upload a pdf, a Word document, Excel, or PowerPoint presentation

Highlight the content to be linked to the file.

upload a pdf

In the ribbon toolbar select **Insert**, then **Hyperlink.**

Select **Component**, and set the **Target** to **New window.**

In the slide window navigate to the right folder.
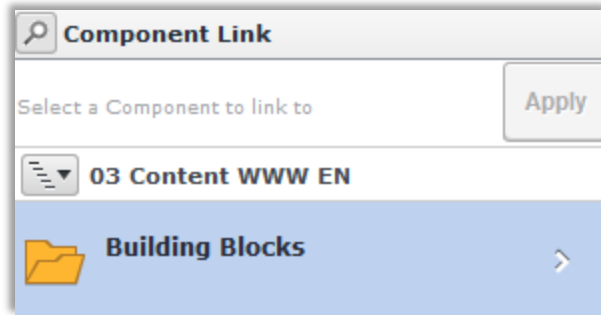
Then navigate to **docs** folder within your department.

Click on the folder.

Then drag and drop the file in the bottom field.
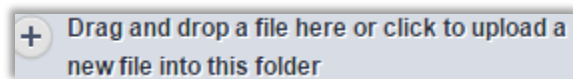
And click **Apply.**

Then click **OK** in the **Hyperlink** window.
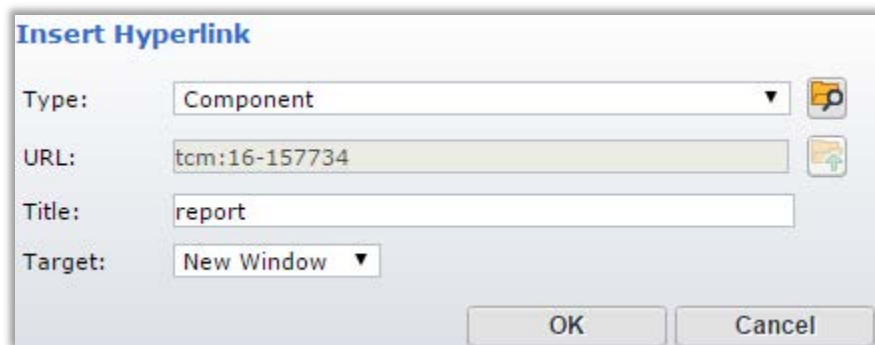
External Link
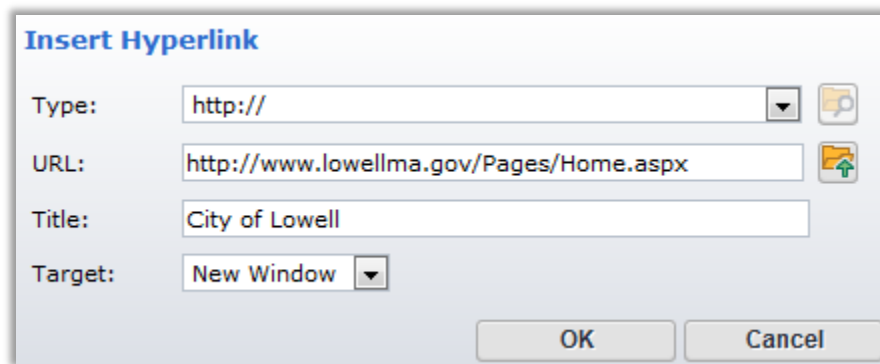
Any link outside of Tridion is considered external link. A typical Tridion page is in the format: www.uml.edu/dept/…/PageName.aspx

Highlight the content to be linked, and in the ribbon toolbar select **Insert** tab, then **Hyperlink.**
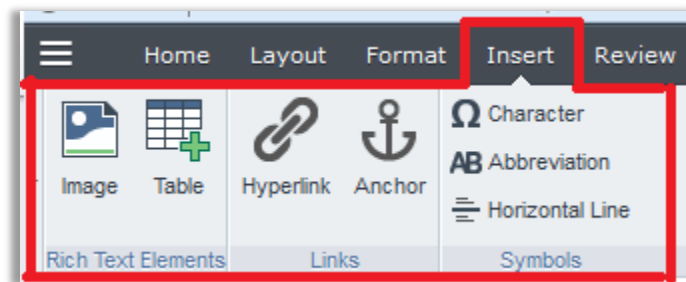
In the following popup window select **HTTP://** for **Type**. And **New Window** for **Target**.

Type or copy and paste the address in the URL field. In case if you paste it make sure the new address does not duplicate "http://".

Check if the link is working by clicking folder/arrow icon.

Internal link

Any link within Tridion (www.uml.edu/dept/…/PageName.aspx) is considered an internal link and linking to a Tridion page is done by linking to the component used by that page. Whereas The URL of the page you are trying to link to can change and the only way to avoid a broken link is to navigate and link to the component used by that page.

First highlight the content to link then select the Insert tab in the ribbon tool bar
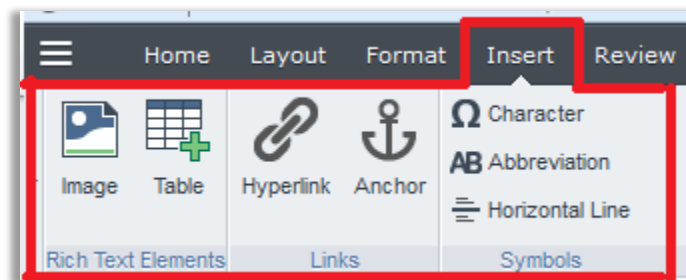
Then click **Hyperlink.**
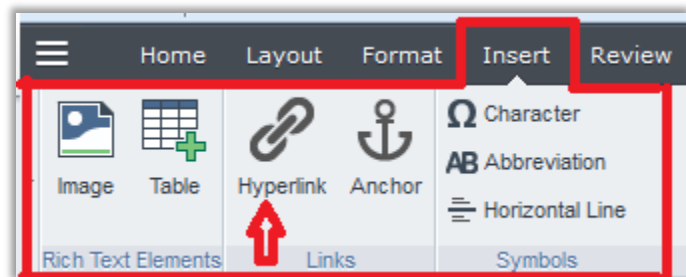
In the next window select "**Component**" under **Type**, and **Default** for **Target.**
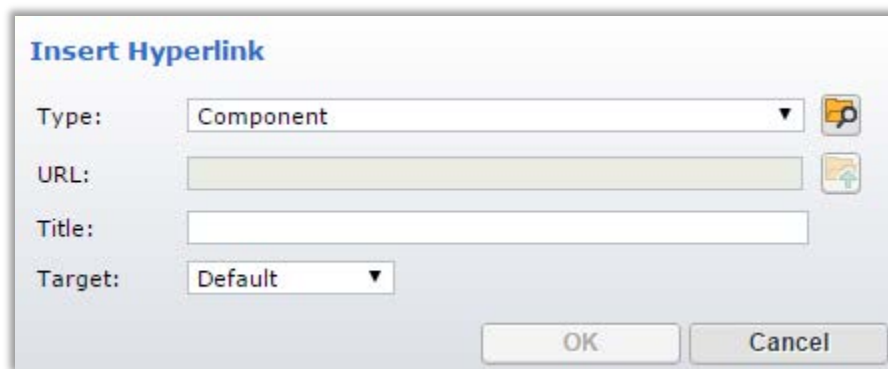
Then click the browse button. .

A slide window will appear in the left.
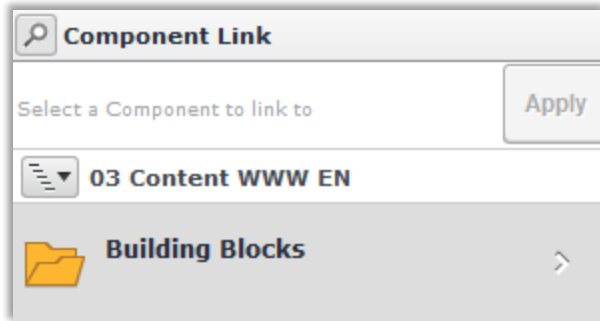
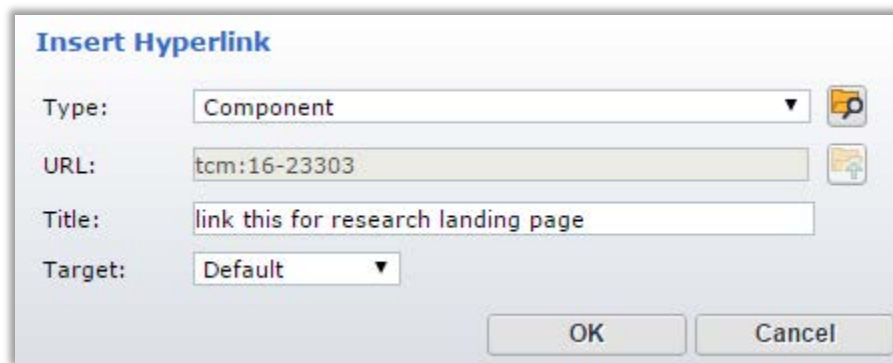Click on arrow next to **Building Blocks**. Then click **Content.**
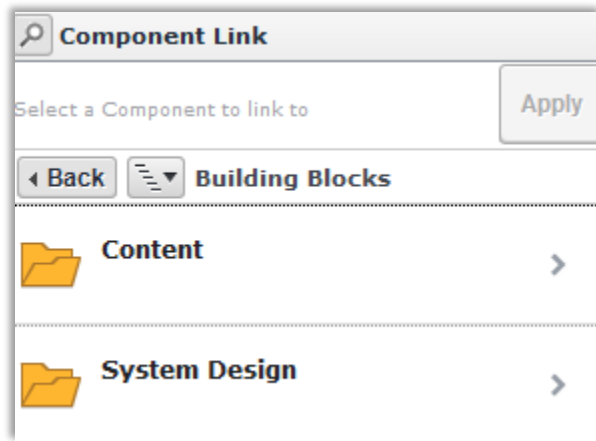
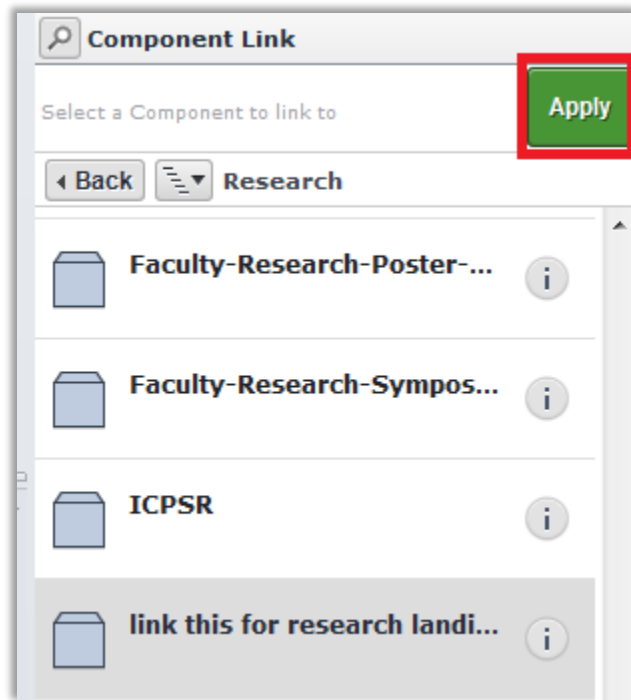

Navigate to the desired folder.
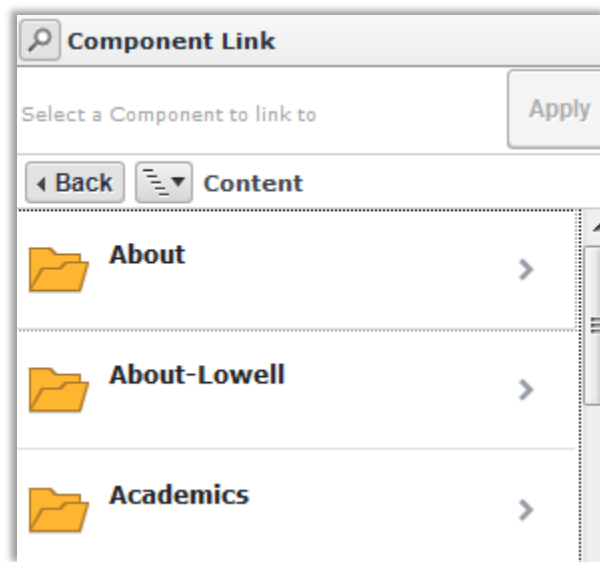
Once in the right folder look for the component.

Select the component you want to use, and then click **Apply** on the top of the slide.

The title field should provide a description as to where the link takes you. Once done, click **OK**.

How to locate a component used by an internal page

Open the page to link to, then change **www** in the URL with **https://stage** and log-in to Tridion.

Click inside the component.

In the ribbon toolbar under **Home** tab click in **Open in Form View.**
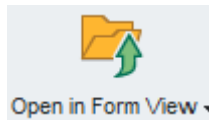
Click the **Info** tab.
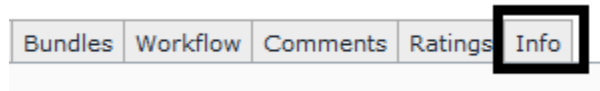
In the example below: the component name is "test-Amy" and the location is the main "Admissions" folder
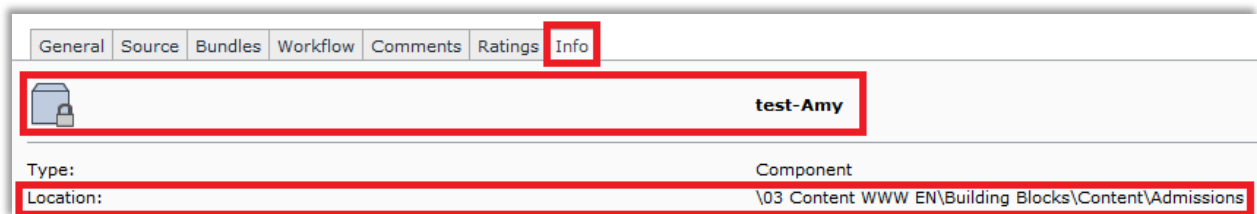
 Will be the component and the name will be displayed at the right

And

Location: will show the component's location in the Content Manager (back-end).

Then you follow the procedure under Internal Link section.

Adding a Table

Place your cursor at the location where you want to insert the table. In the ribbon toolbar click **Insert** tab, then **Table** button.
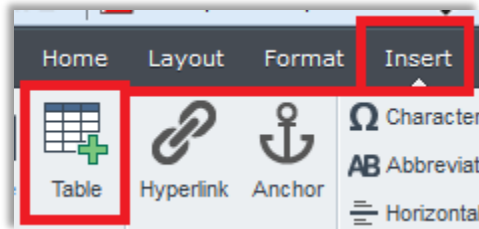
When **Insert Table** window appears, enter the numbers of rows and columns. Click **OK** when done.
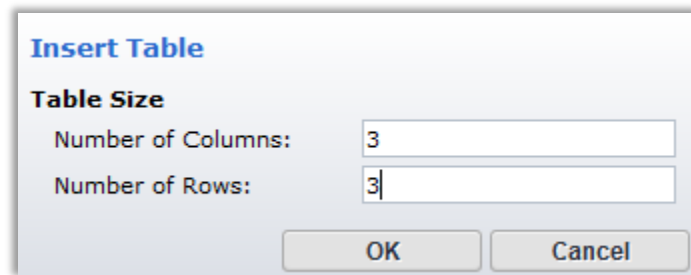
A table editor window will pop up.

By default the content will be **Body** style (normal formatting).

To make table heading: select **Row** tab, click inside the row, and in the **Row** Formatting menu in the **Body/Header/Footer** section select **Header**.
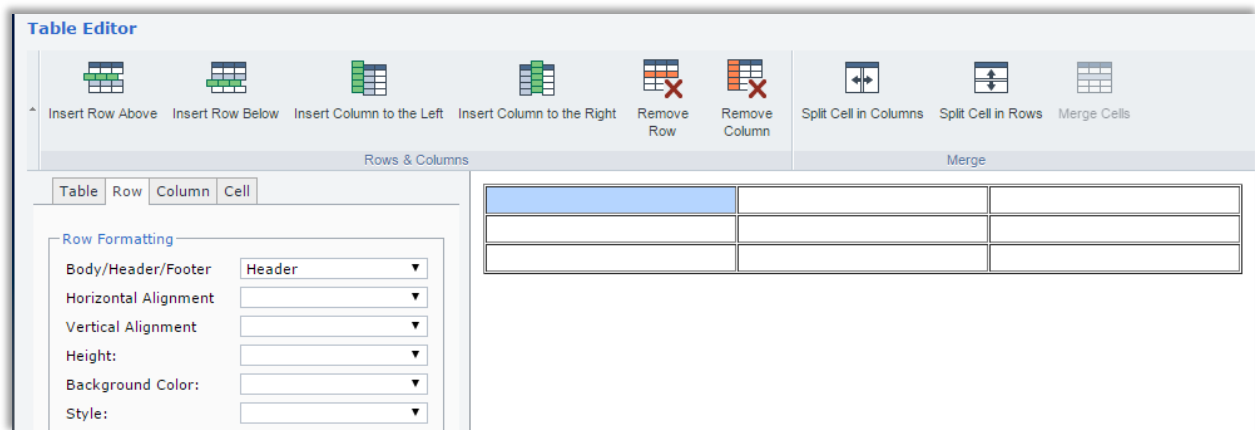
Then click **OK.**

In SiteEdit mode click inside the cell and type the table content.

Edit an Existing Table

To edit an existing table click inside the table,
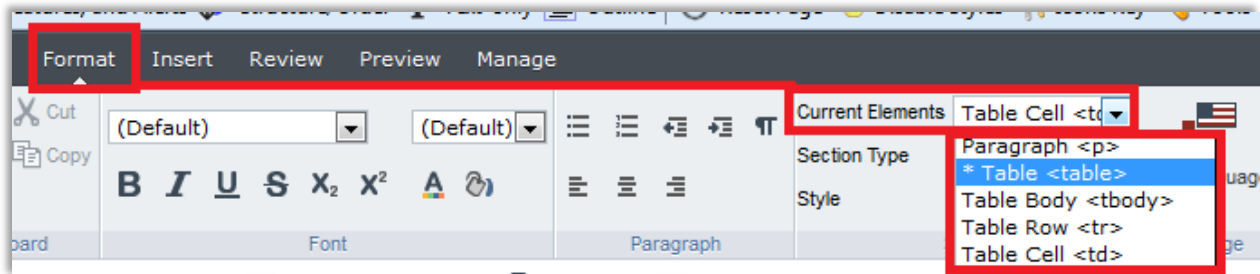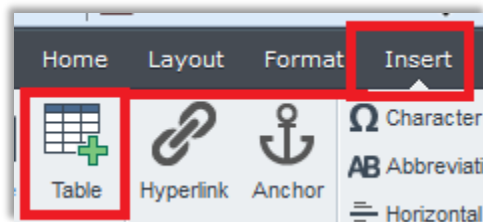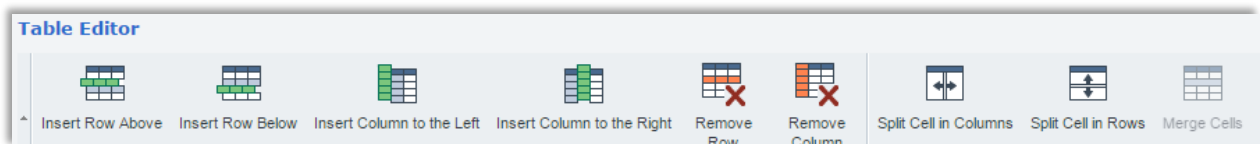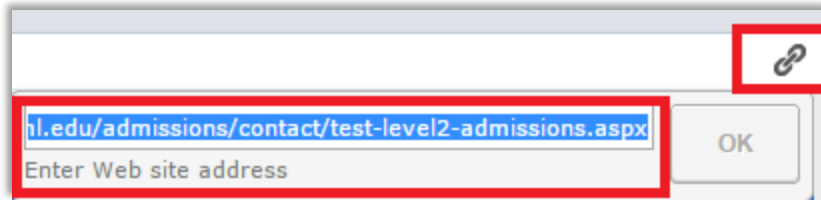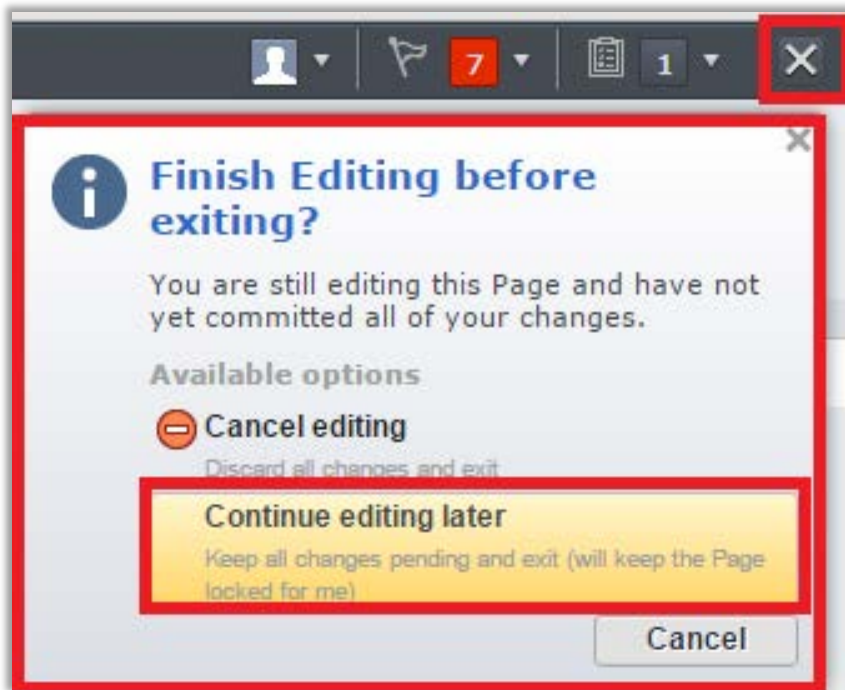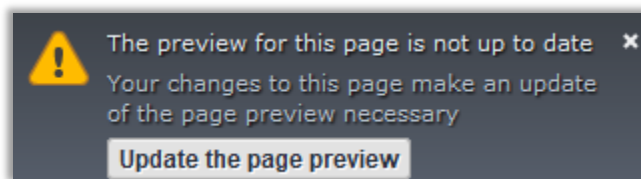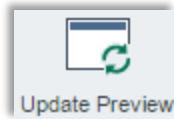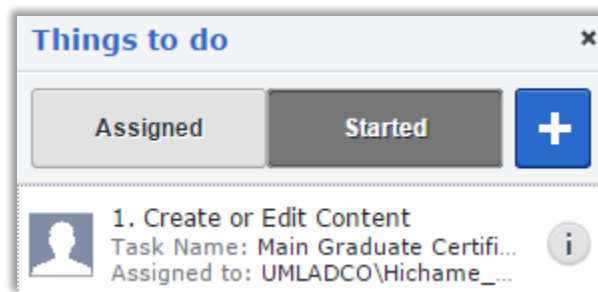
In the formatting toolbar select **Format** then under **Current Elements** drop down menu select ***Table<table>,** then click **Table** button under **Insert** tab.

In the **Table Editor** window click inside any cell to activate the top menu which will allow you to remove/insert row above or below, remove/insert column to the left or to the right …

Apply the changes, and click **OK**.

To finish editing the page at a later time

Click the link icon   in the top right of the editable border.

Copy and save your URL somewhere where you can easily find it.

Then click the ☒ in the top right of the Tridion page **not the browser.**

Click **Continue editing later.**

When ready to edit the page just paste the saved URL, and log-in to Tridion.

When prompted with the message.

On the page's top right click to update.

Or Click **Update Preview** in the ribbon toolbar

Update Preview

How to preview the changes before submitting to workflow

After editing the page, click outside the component being edited.

Under Home tab in the ribbon toolbar, click Finish Editing.

Finish Editing

To preview the page before submitting, click Things to do tab in the top left

Select the component to preview

Things to do   ✕

| Assigned | Started | + |

1. Create or Edit Content
Task Name: Main Graduate Certifi...
Assigned to: UMLADCO\Hichame_...

Click Finish Activity

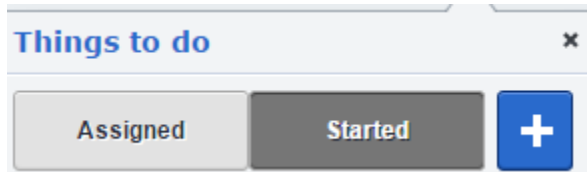And in the Next activity drop down menu select Publish for Preview

Then click **Done**

Now copy the stage page url by click 🔗

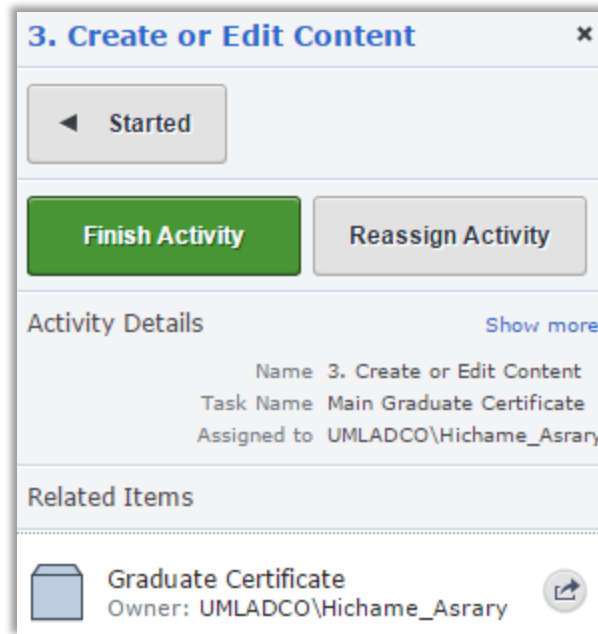Paste it in a new browser tab to check the links and the page layout.

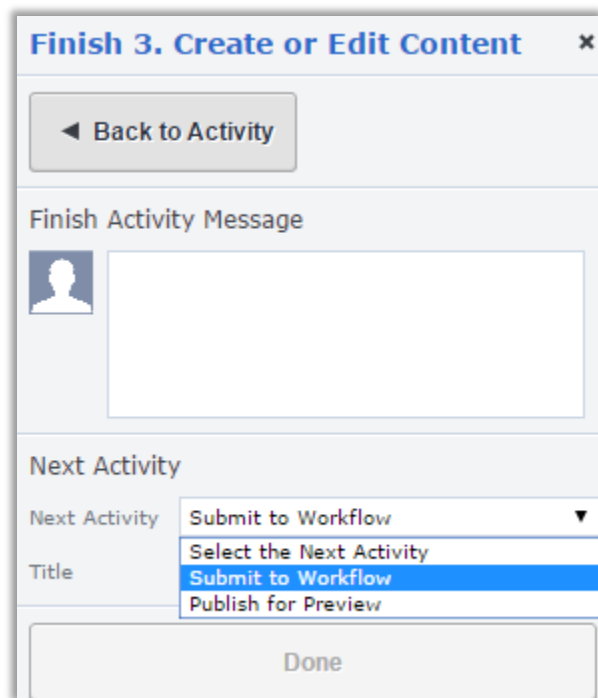Now go back to "Things to do" and click "Assigned". Select the component you are working on and

Click Start Activity if more edits are required, and click inside the component. Otherwise follow the next steps.

Submit to the Workflow

Click Finish Activity

Finish Activity Message: In the comment box type the summary of all the edits and a message to the webcontent team if needed. Remember when you submit to the workflow, by default the page will be published live. If you want the page to go stage only, you need to mention it in the comment box and type"publish stage only". Also if you need to add a page to navigation (left hand menu in the live website) mention it in the comment box and specify the exact location in navigation.
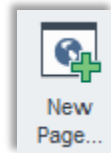
In the Next Activity menu select Submit to workflow, and click Done

Then click **Done**.

Create a New page

Under the ribbon toolbar, select Home tab then click New Page.

Select a specific page in your department from the slide window to the left.
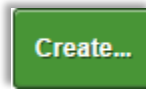
For Admissions website use either:

- Admissions News page
- Admissions Page with Picture and sidebar (level 2)
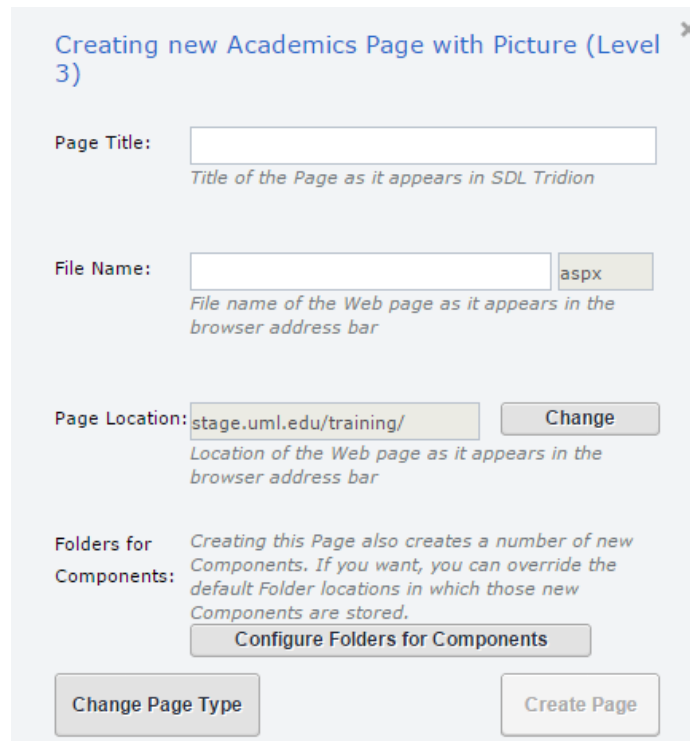- Admissions page with Picture (level 3)
- Admissions Page without Picture

For other departments "Admissions" will be replaced by your department name automatically.

Click **Create**.

In the pop-up window fill in the **Page Title**, and the **File Name.** In the **File Name** use a dash and avoid spaces.
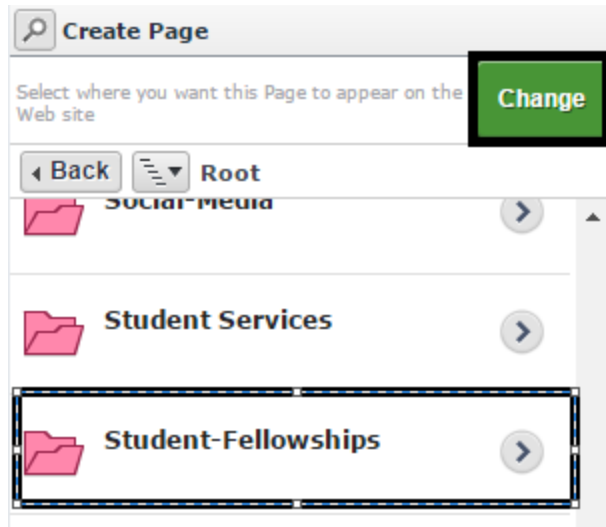

Changing the page and the Component locations

You can change the page location if needed (if you have more than one folder in your department) by clicking **Change** next to **Page location** field.
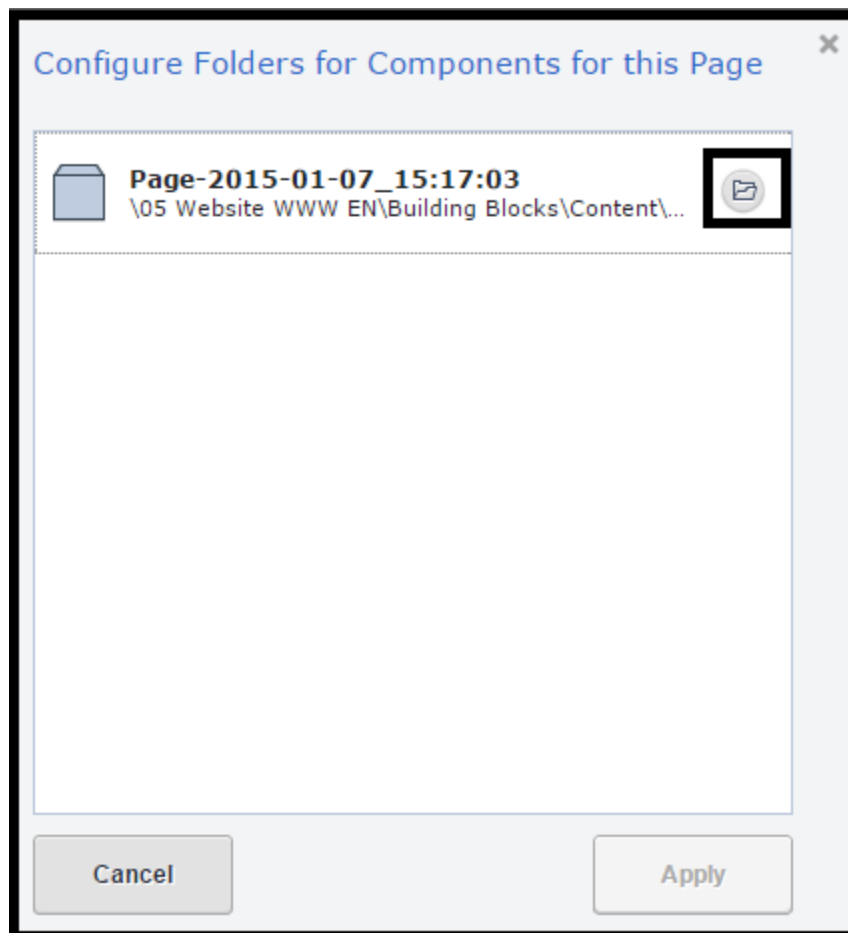

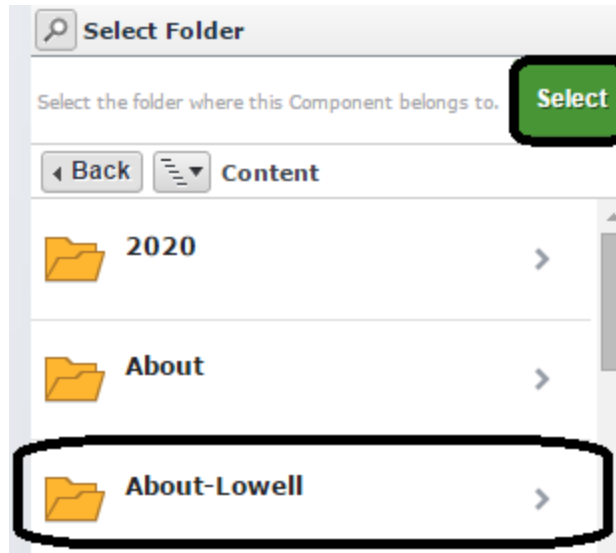
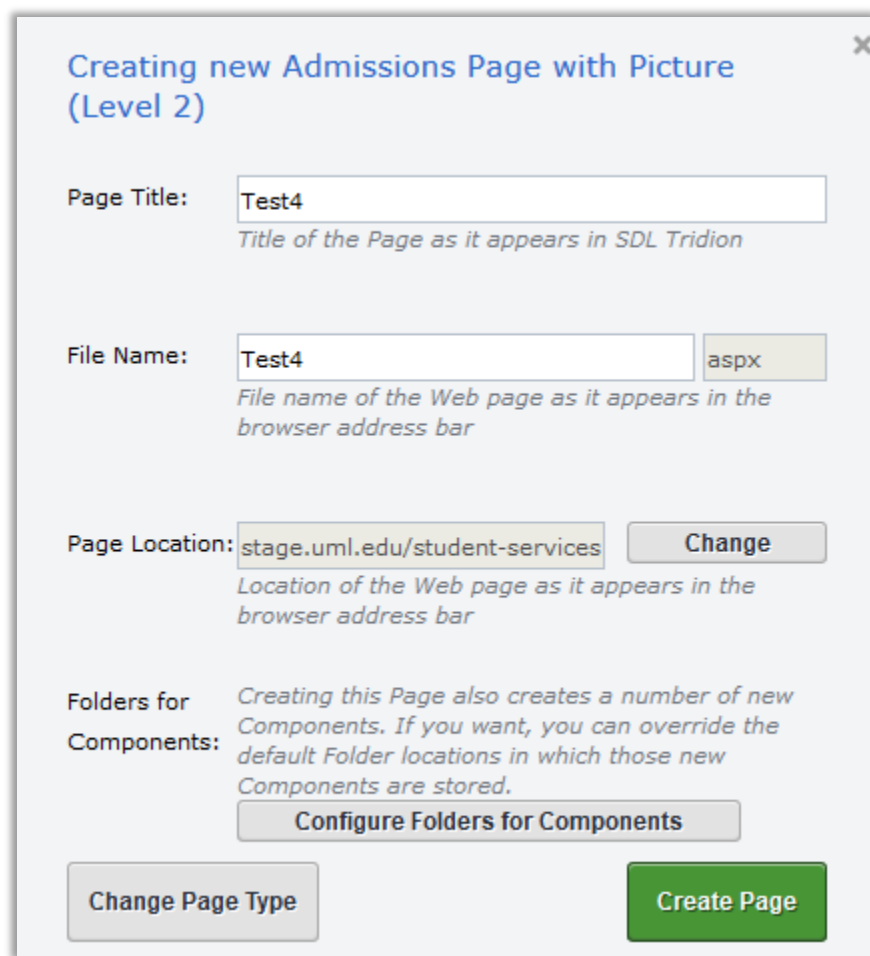And in the window slide navigate to the right folder (pink color) then click Change.

If you need to change the location of the component click Configure Folders for Components . Then click browse 📂 .

Navigate to the desired folder (yellow color), and select.
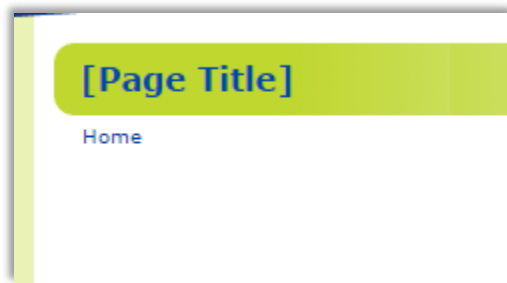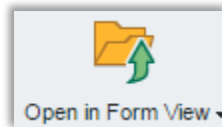
Click Apply.

Click Create Page.

The page will reload with a blank page.

To change the green title select **Open in Form View** under **Home** tab in the ribbon toolbar.

The page will be open in the back-end of Tridion rather than Experience manager (SiteEdit).

You can edit the display title and add a navigation title if needed.

In this step the page template can be changed from level 4 to level 2 or level 3 or vice versa.
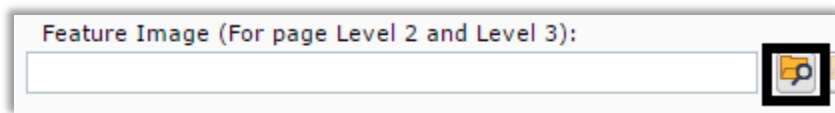
In the page template drop down menu select level 2 or level 3

Then add a feature image (Feature image is required for level 2 and level 3 pages).

Note: Feature image must be optimized by the Webcontent team to fit the customized area in the page. Please email all images to be optimized to webcontent@uml.edu.
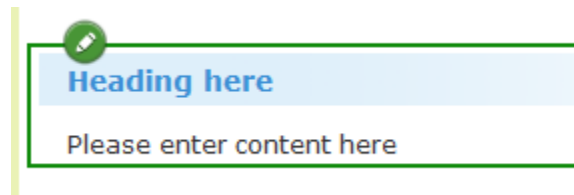
In the feature image box click browse

And in the new pop-up window navigate to the folder containing the feature image:

Department/multimedia/Feature image folder

Select the image and click **Insert**, then click **Save and Close** on the page's top left.
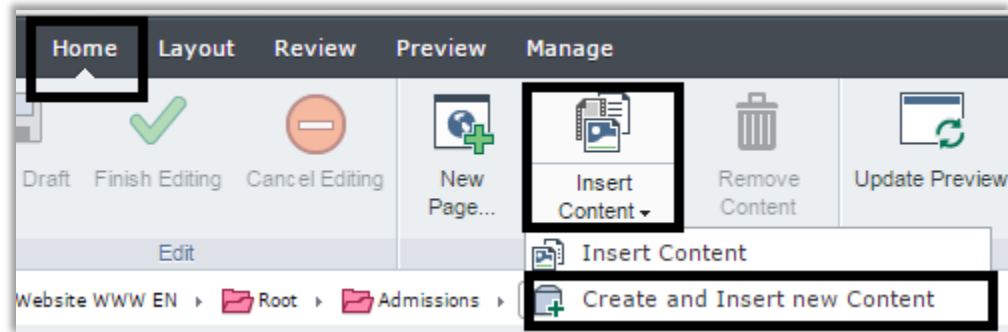
Component in new page

When a new page is created using department template, the component will be created automatically once the page is reloaded.
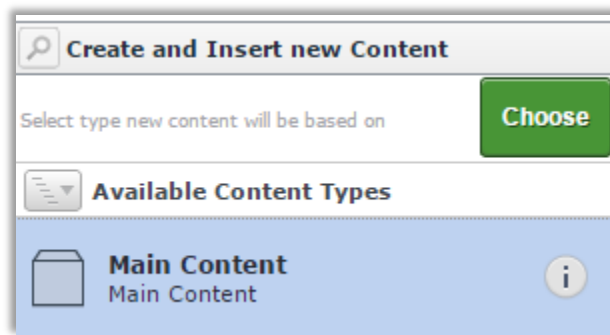

You can use the steps in the editing an existing page to edit this component and submit to the work flow.

Adding a New Component

In the ribbon toolbar, click **Home** tab then under **Insert Content** select **Create and Insert new Content**.

In the slide window click **Main Content** then click **Choose**.

In the pop-up window fill the **Content Title** and make it the same name as the page.

Change the location by unchecking the **Use Default Folder** and click browse, navigate to the folder corresponding the page's folder (same name just the color is yellow). Then click **Create and Insert Content.**

Note: Name the component the same name as the page

After the page is refreshed (automatically) the component is added to the page, and it displays a heading and content allowing edits.

To start editing just click inside the content, and follow the directions from the beginning of this manual.

To submit to the workflow

Under Home tab in the ribbon toolbar, click Finish Editing.