Basic Training

UNDERSTANDING THE TEMPLATES

The SIU Templates for the Cascade Server Content Management System (CMS) have several different areas where users can create and edit website content. Some areas allow for repeated content, where others areas are editable only at page level. (Please see images on the following pages to view the different editable areas for each template.)

SIU Headers

SIU Headers are created and edited through the main administration of the CMS. Users <u>do not</u> have access edit SIU headers.



ABOUT SIU » ADMISSIONS » ACADEMICS » F

Site Title and Tagline

The site title is the name of the department. Users <u>do not</u> have access to edit the Site Title. Special characters are not allowed in the site title. If the name of the department changes, please call Interactive Services.

OFFICE OF SPONSORED PROJECTS ADMINISTRATION BIG THINGS ARE WITHIN REACH

The tagline could be a tagline for the University or department, or it could be the name of the umbrella department. This is flexible and not required. Not all templates allow for a tagline.

Banner

This is the main image for a web page. The banner can be different on each page.



Navigation

The navigation for a site is generated

automatically based on the structure of a site. This is why it is very important to have an organized site structure. Users can choose to exclude certain items from the navigation if desired.



Main Content Area

The main content area holds the main content of a web page. Some templates have extra areas, such as intro text and callout boxes.

HOME PAGE

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eu nulla a nulla varius cursus. Suspendisse dictum tincidunt nibh quis viverra. Donee diam ante, dictum ut lacinia nec, tincidunt sit amet orci. Pellentesque vitae diam odio, non gravida lacus. Praesent mattis, lectus ac consectetur pretium, ligula diam

Left Sidebar

The left sidebar has optional areas. If no content is entered for those areas the left sidebar will not appear. These optional areas can contain content entered at the individual page level or in blocks - content that can be shared among many or all pages.



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Right Sidebar

The right sidebar has optional areas. If no content is entered for those areas the right sidebar will not appear. These optional areas can contain content entered at the individual page level or in blocks - content that can be shared among many or all pages. Not all templates allow



pages. Not all templates allow for a left sidebar.

Feature Areas

Feature areas are special sections of a web page, usually the home page, where users can bring attention to specific

FEAT	URE AREA
	an optional area whe cements, etc.
O FEA	TURE

important information, like deadlines, news stories, featured faculty, or any other calls to action. Feature areas are optional and can contain one, or more than one feature item. The maximum number of feature areas allowed depends on the template.



Contact Footer

Contact information for a department is a requirement on the SIU templates. Basic

contact information must appear within the footer. You can choose to keep the phone number as the general SIU phone number (618-453-2121) or enter the department phone number. The Webmaster (technical contact) for the website must be listed here.



Social Media Footer

The social media footer area is optional. Links in this area can include, but are not limited to, a general email contact, Twitter page, or Facebook page. This area can be left empty, use the main SIU social media links, or use unique departmental social media links.



SIU Footer

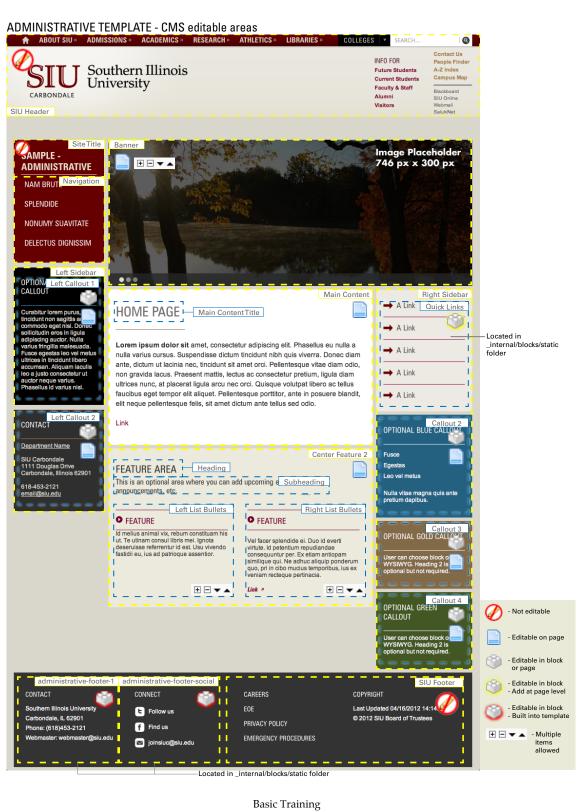
The SIU Footer is edited through the main administration of the CMS. Users <u>do not</u> have access edit the SIU footer.

CAREERS EOE PRIVACY POLICY EMERGENCY PROCEDURES COPYRIGHT

Last Updated 04/23/2012 10:21:18 © 2012 SIU Board of Trustees

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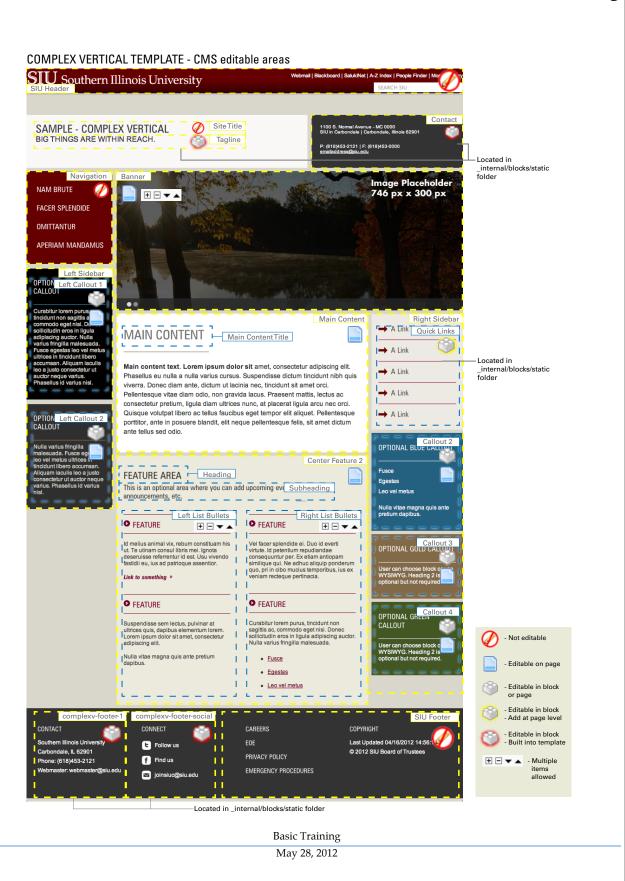
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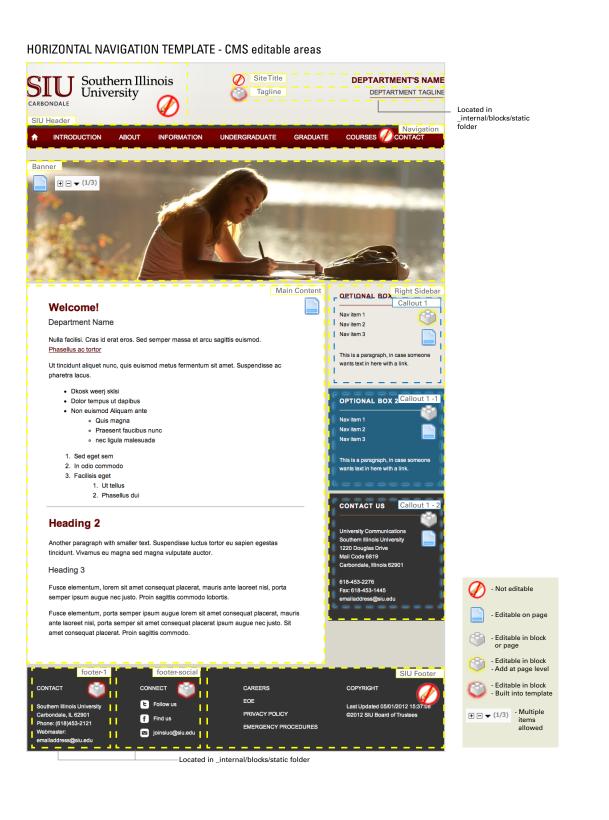
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Cascade Server

Remember me

Log In

Basic Training

0

ACCESS YOUR SITE

Cascade Server CMS is web based so you can access your site using the web browser of your choice.

LOGGING IN

Website

stage.web.siu.edu

<u>Username</u>

Users first initial and last name. (Example: Jill Smith's username would be jsmith.)

Password

You will set your password in training. Please choose something you will remember. If you lose your password please fill out a help ticket requesting a password reset at:

http://www.webservices.siuc.edu/ticket/

CASCADE SERVER CMS BASICS

DASHBOARD

<u>Description</u>: The dashboard shows messages, general information and a summary of recent activities

SYSTEM MENUS

<u>Description</u>: System Menus provides access to particular areas and tools of the system.

Site Chooser

A Site-chooser drop-down will be displayed at the top of the interface, allowing you to easily jump between the Global Area and content specific to a particular site.

Cascade Server			Global	•
Ø¥	<u>H</u> ome	<u>N</u> ew ≽	History	
🕀 🛅 Base	Folder		4	🏠 Dashboard

System Menu

Log In

The system menu contains system wide search, configurations, utilities, and preferences.



Home, New, History, and Administration Menus:

Home New & History Administration &

<u>HOME</u>: will take you back to the dashboard.

<u>NEW</u>: allows you access and create new content assets, like files, folders, pages, or blocks.

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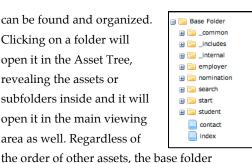
HISTORY: will allow you to view and quickly navigate to all of your recently viewed assets.

ADMINISTRATION: will allow you to view administrative components of the system.

ASSET TREE & BASE FOLDER

Description: To the left of the Dashboard is the Asset Tree where all assets in the system

can be found and organized. Clicking on a folder will open it in the Asset Tree, revealing the assets or subfolders inside and it will open it in the main viewing area as well. Regardless of



always remains at the top of the Asset Tree

ASSETS - ABOUT AND CREATING

An asset is any entity within the system that can be used to generate content. There are five main types of assets for a site - FOLDERS, PAGES, EXTERNAL LINKS, FILES, and BLOCKS.

FOLDERS

Description

A site should be organized into different FOLDERS in order for the site navigation to display properly. Each FOLDER contains pages, external links, and files related to that section of the website. The FOLDERs Display Name determines the text that appears as a link in the main navigation of a site.

Requirements

Each FOLDER must contain one main file that is named index if you want it to appear in the site navigation - this index page will be the main page for the section. For the site navigation to display properly, it is very important that folders and files within the CMS be in the proper structure.

about index careers index careers index	Example: FOLDERS & SITE NAVIGATIO The main navigation of this site example will use each FOLDER's	ON About Us Careers
contact-us index news	Display Name to show the name of the section and will look similar to the navigation on the right. \rightarrow	Contact Us News
📄 index		

Basic Training

TO ADD NEW FOLDER:

Click *NEW* in the *System Menu*, then *SIU Assets*, then FOLDER WITH INDEX. (Note: this will create a folder with a home page by default. If you wish to ONLY create a folder choose *New*, then *Default*, then *Folder*.)

Enter FOLDER information:

System Name: Give the FOLDER a meaningful name. Names must contain letters and numbers only, hyphens instead of spaces, and should not have uppercase characters.

Parent Folder: Choose the folder where you want to save the new FOLDER. (Note: it is acceptable to create folders within folders for organizational purposes.)

Display Name: The *Display Name* is the text that will appear in the main navigation.

Title: The *Title* is NOT relevant for a FOLDER but it is required so make the title the same as the *Display Name*.

Include in Navigation: Include or do not include the FOLDER in the main navigation.

Publish checkbox: Uncheck if you do not wish to publish this asset in the future.

Index checkbox: Uncheck if you do not want this item to be included in the site navigation.

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PAGES

Description

A PAGE is an individual "web page". By default, each FOLDER will contain a PAGE named index (see Example 1). Additional PAGES can also be added to each FOLDER. Each page will be included in the navigation of the site, with the *Display Name* as the navigation item text, unless the user chooses the "No" radio button for the option "Include in Navigation".

Requirements

When creating a PAGE, make sure it is *always* within a FOLDER of the site, and *not* in the root of the site.

Click NEW in the System Menu, then SIU Assets, then PAGE.
Enter PAGE information and content:
<i>System Name</i> : Give the PAGE a meaningful. Names must contain <u>letters and</u> <u>numbers only, hyphens instead of spaces, and should not have uppercase</u> <u>characters</u> .
Parent Folder: Choose the folder where you want to save the new PAGE.
<i>Display Name:</i> The <i>Display Name</i> is the text that will appear in the main navigation.
<i>Title</i> : the <i>Title</i> is the text that will appear as the title of the page at the top of a browser tab or browser window. This should be named with the following structure: "Page Title Department Name SIU".
<i>Include in Navigation:</i> Include or do not include the PAGE in the main navigation.
<i>Other editable regions:</i> There are many other editable regions to the page that change depending on template. Refer to the template layout images on pages 3 - 5 of this document. These are the areas where main content of the page is added
Click SUBMIT

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Basic Training

EXTERNAL LINKS

Description

Links to external Web sites that are not connected to a site but need to be included in site navigation.

Requirements

In order to include an EXTERNAL LINK in site navigation, create new EXTERNAL LINK asset and save it in the root folder of the site. The *Display Name* is what will appear as a link if you choose to include the link in the site's navigation.

TO ADD NEW EXTERNAL LINK:

Click NEW in the System Menu, then SIU Assets, then EXTERNAL LINK.

Enter LINK information and content:

System Name: Name the link logically. Names must contain <u>letters and numbers</u> only, hyphens instead of spaces, and should not have uppercase characters.

Parent Folder: Choose the folder where you want to save the new EXTERNAL LINK.

Display Name: The *Display Name* is the text that will appear in the main navigation.

Title: the *Title* is NOT relevant for an EXTERNAL LINK but it is required so make the title the same as the *Display Name*.

Include in Navigation: Choose to include the EXTERNAL LINK in the main navigation or not.

Link: Enter the full URL of the link, including "http://".

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Basic Training

📃 FILES

Description

FILES are images and documents that you wish to upload to your site.

Requirements

Always upload image FILES to the *images* folder within the *_common* folder. Always upload documents such as .pdf files, .docx files, and .xlsx to the *_documents* folder.

TO ADD NEW FILE:

Click NEW in the System Menu, then Default, then FILE.

Enter FILE information and content:

System Name: If uploading a file you do not need to enter the system name. **Names must contain** <u>letters and numbers only, hyphens instead</u> <u>of spaces, and should not have uppercase characters</u>. Do not make file names longer than necessary. For example, a file named 2011-outstanding-faculty-of-the-year-application.pdf should be shortened to 2011-outstanding-faculty-app.pdf.

Parent Folder: Choose the folder where you want to save the new FILE. (Note: most files are saved and organized in the *_common* folder, either in the *images* folder or the *documents* folder.)

Browse to the file on the computer by clicking *Choose File*. When the file is uploaded make any neccessary edits to the file.

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Basic Training

BLOCKS

Description

A BLOCK is a "pluggable " and reusable piece of content that can be easily substituted, with or without styling, into page regions.

<u>Requirements</u>

Always save BLOCKS to the *user-defined* folder within the *blocks* folder within the *_internal* folder. Create BLOCKS <u>ONLY</u> if you will need to reuse the content of the BLOCK, in order to save time and prevent error in editing identical content.

TO ADD NEW BLOCK:

Click NEW in the System Menu, then Default, then BLOCK.

Choose XHTML/DATA Definition Block, then click Submit

Enter BLOCK information and content:

System Name: Name the BLOCK logically. Names must contain <u>letters</u> and numbers only, hyphens instead of spaces, and should not have <u>uppercase characters</u>.

Parent Folder: Choose the folder where you want to save the new BLOCK. (Note: BLOCKS should be saved and organized in the -__internal/blocks/user-defined folder.)

Enter the content for the BLOCK in the WYSIWYG editor.

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Basic Training

UNDERSTANDING THE REGIONS IN THE EDIT VIEW

The view when editing a page should look very similar to the image below. This is the edit view for the Administrative Template – others might have slight differences.

Each editable area is identified in the images on pages 3-5 of this training manual. Notice that the name of each region on the image is the same as the name of the region in the edit view of the page.

Display Name 🔶	Nonumy Suavitate					
Title 🕯	SIU Department Name	e				
Include in Navigation?	Yes ○ No No					
Include in Narigation		ADMINISTRATIVE 1	EMPLATE - CMS editable a	reas		
ministrative inside		ABOUT SIU · ADM	ISSIONS » ACADEMICS » RESEARCH »	ATHLETICS = LIBRARIES = COLLEG	Contact	
			uthern Illinois		INFO FOR People F Future Students A-Z Index	inder K
Banner			niversity		Current Students Campus Faculty & Staff Blackboar Alumni SIU Online	
		SIU Header			Visitors Webmail SalukNet	
Alt Text			Banner	The state of the second	Image Placeholde	2
Main Content		ADMINISTRATIVE		Carlo Station	746 px x 300 px	
Main Content		NAM BRUT, Navigation	Sea Aline and			
Main Content Title	Nonumy Suavitate	SPLENDIDE	a house of the second			
Content 🕯		NONUMY SUAVITATE				
$\Omega \mid \mathbf{x}_{a} \mid \mathbf{x}^{a} \mid \mathbf{B} \mid \mathbf{I}$	<u>U</u> AB€ ≣ ≣ ≡	DELECTUS DIGNISSIM				
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			elit neque pellentesque fells, sit amet d	ctum ante tellus sed odio.		
		CONTACT	Link		OPTIONAL BLUE CALLO	2
		Department Name	;	Center Feature 2	Fusce	
ath:		1111 Douglas Drive Carbondale, Illinois 62901	FEATURE AREA Heading		Egestas Leo vol metus	
		618-453-2121 email@siu.edu	This is an optional area where you can a announcements, etc.	d upcoming e Subheading	Nulla vitae magna quis ante	
Center Feature 2		×	O FEATURE	FEATURE Right List Bullets		
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					CALLOUT	- Not editable
					User can choose block o	- Editable on page
					WYSIWYG. Heading 2 is optional but not required.	- Editable in block
			er-1 administrative-footer-social		SIU Footer	or page
		CONTACT			зіднт 🔗	- Editable in block - Add at page level
		Southern Illinois University Carbondale, IL 62901	E Follow us	B 201	Ipdated 04/16/2012 14:14 2 SIU Board of Trustees	- Editable in block - Built into template
		Phone: (618)453-2121 Webmaster: webmaster@siu	edu 🛛 🥑 joinsluo@siu.edu	PRIVACY POLICY		± = ▼ ▲ - Multiple
						items allowed
			Located in	internal/blocks/static folder		

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Basic Training

REGION OPTIONS

There are different methods of adding content to each region, depending on the flexibility set up in the template.

TEXT ONLY

Some regions only allow text entry with no added options, for example:

•	Main	Content	┝

Main	Content	Title	Nonumy	Suavit
------	---------	-------	--------	--------

WYSIWYG EDITOR

WYSIWYG stands for "What you see is what you get". Some regions allow text entry with the options to add links, images and styling within text content, for example:

Content	
$\Omega \mid \mathbf{x}_{\mathbf{z}} \mathbf{x}^{\mathbf{z}} \mid \mathbf{B} \mathbf{I}$	<u>U</u> ABC ≡ ≡ ≡ Styles • Format •
🔏 🗈 🕰 ն 🖓	ਝ • 田 田 淳 葎 🤊 🍋 👓 🔬 🖉 🖉 🚍 🛷 📿 🎟 🥅 🗐

FILE SELECTOR

Some regions allow you to select files within the site to use in the regions. These are for adding images or blocks, for example:

▼ Banner	▼ Left Sidebar
Banner Image \ominus 🔲 []	Left Callout 1 🤤 🏐 []

To use an image or block in these areas click the image or block icon and navigate to the correct file within your site.

FILE SELECTOR or WYSIWYG EDITOR

For these unique areas, if a block is not chosen for content, the content of the WYSIWYG editor will be used. If there is no block chosen and no content in the WYSIWYG, the region will not appear on the page, for example:

	Left Callout 2	Θ 🕸 0
Le	ft Callout 2 Heading	
Le	eft Callout 2 Content	
Ω	$ \mathbf{x}_{2} \mathbf{x}^{2} \mathbf{B} \mathbf{I}$	U ABC ≣ ≣ ≣ Styles . Format .
X	i 🗈 🚨 💼 🌿	🏶 - 汪 汪 淳 淳 🤊 🕐 👓 👰 🕹 💆 🖉 🔚 🖛 🍼 📿 🎟 🛄 💷
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index

View
Edit
Move/Renand

Copy

Delete
Access

Audits

Versions

Basic Training

REGIONS WHERE MULTIPLE ITEMS ARE ALLOWED

If a region will allow for the entry of multiple areas of content a plus symbol will appear in the upper left of the region's editing area. To add another area click the plus symbol. Once there are multiple items in that region a symbol in the upper left will appear that indicates which order the items are in, allows the user to change the item order and

allows the user to delete the item. The symbol looks like this: 🕀 🗖 🔻 🛦 (2/3)

Use the plus and minus, and up and down arrows to add, move or delete items.

MAKING CHANGES TO ASSETS

Once created, *Assets* can be edited in many different ways. When previewing an *Asset* in the CMS a menu will appear above the preview of the page. Additionally, clicking the small arrow that appears upon rollover in the *Asset Tree* will display the same options.

 View
 Edit
 Move/Rename
 Copy
 Publish
 More ▷

 Layout
 Preview
 Live
 Properties
 Lock
 Configurations

EDIT

Once created all Assets can be edited.

- Start by locating the *Asset* in the asset tree and clicking on the *Asset* you would like to edit.
- 2. Once the *Asset* has loaded, click on the Edit tab located above the preview.
- 3. From here you are able to edit all the content of an *Asset*. Make the desired changes to the document. While you are editing an *Asset*, such as a page, file, or folder, the asset is automatically locked to prevent other users from accessing the same asset while it is being edited. When edits have been made and the asset has been submitted, the asset is automatically unlocked so that other users can access it.

MOVE/RENAME

All Assets can be moved and renamed. Change the system name of a file or move it to a different location with in the site.

COPY

This feature can be handy if there is a page that has blocks or features added to it that you want to appear on a new page. Copy current pages and place them anywhere in the site.

PUBLISH

The Publish tab allows users to publish assets to a web server.

MORE >> VERSIONS

Cascade Server maintains a full version history on each asset in the system. As

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Basic Training

changes are made to any asset in the system, Cascade Server keeps track of the changes in separate copies of the asset called *Versions*. The versions list for each asset shows a list of each version, the author for each change, including the original creator of the asset, as well as the time and date of the change and any notes available. Users may navigate through the various versions, compare them with the current version, and activate any version desired.

MORE >> DELETE

Delete any asset. When deleting, you must also click the *Un-publish Content* checkbox so that the asset is deleted from the web server. The DELETE area will display a list of all pages within your site that are linking to that *Asset*.

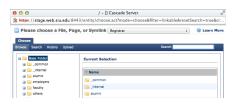
ADDING A LINK TO PAGE CONTENT

Add links to existing pages within your site, external websites, or to PDF documents.

- Within the WYSIWYG editor, highlight the word or words you wish to turn into a hyperlink.
- Click the insert web link icon on the toolbar. The insert link window will now open with two options - one for internal links, and one for external.



3. To insert a link to a page or document within your site, click on the page icon to open a new window that will allow you to select the page to which you will link.



4. To insert an external link, paste the URL of the external link into the LINK field. Change TARGET to *New Window* if you want the new page to open in a new window.

	Insert/Edit Link X
	◯Internal
Link	http://
Anchor	
Target	New Window 🕴
Title	
Class	Styles +
0.035	
Insert	Cancel

5. Click INSERT

Basic Training

ADDING AN IMAGE TO A PAGE

ADD AN EXISTING IMAGE

- While editing a page, in the WYSIWYG editor click the *Image* icon.
- In the new pop up box, click the *File* icon and navigate to the _common/images folder.
- 3. Choose the image and click *Confirm*.
- 4. Add *Alternative Text* for the image.
- 5. Click Insert
- Don't forget to publish the image or it will not appear on a web page (see page 19, PUBLISHING).

Note: to change the alignment of an image, click the *Advanced* tab in the *Insert/Edit Image* window and change the alignment in the dropdown menu.

ADD A NEW IMAGE

- In the System Menu at the top click
 NEW.
- Under the DEFAULT pop-out click FILE. File
- Make sure the PARENT FOLDER is set to the _common/images folder
- Scroll down to the DATA area and click CHOOSE FILE.
- 5. Navigate to the file on your computer and open it.
- 6. Once done resizing or editing the image, click SUBMIT.
- Go to the page you wish to add the image to and follow steps 1-5 in *Add an Existing Image.*

Note: If you are adding a static banner photo (not slideshow photo) to the CMS, instead of

following #2 on this page, click NEW > SIU ASSETS > "Static Banner Photo" or "Header Photo". This action will resize the photo to fit the banner or header photo area for that template.

ADD A NEW BANNER IMAGE

When editing the page, click the *File* icon in the *Banner Image* area. Choose the file you wish to add, click confirm and then add the Alternative Text for that Image.

Common SIU Images

All CMS users have access to a library of approved images. In the *Site Chooser*, choose the site named "Common Images" and browse to the images you wish to use. There are folders containing images sized to the appropriate banner image size. These images are already published.

Photo Rotations

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Basic Training

REPLACING A DOCUMENT OR FILE

PDF files and other documents might be updated on a yearly basis. Rather than uploading a new document you have the option to override the document you want to replace. The same is true with images, and other types of documents.

- 1. Navigate to the document you want to replace (probably in *_common/documents* FOLDER).
- 2. Click the file for the document to preview it and click EDIT.
- 3. Click CHOOSE FILE to browse to the new file on your computer.
- 4. Click SUBMIT.
- 5. PUBLISH the new file.

REORDERING THE NAVIGATION

The order of the links in the navigation can be changed. In the *Asset Tree* click the BASE FOLDER. The view should look something like the image below.

Click the *Order* column heading to display the site folders and files in order. Either click and drag the files or folders to change the order, or use the blue up and down arrows on the right.

To reorder items within a folder, click the folder name in the Asset Tree and reorder them in the same way.

View Edit Publish Workflows More ▷ ontents Gallery Properties					
	▼ Name	Order	Last Modified	Last Modified By	Actions
	🔁 _common	1	Jan 10, 2012 9:29 AM	aliz 🚨	🛣 🔺 💌 🔛 🥖 🔕
	📴 _internal	3	Jan 8, 2012 4:07 PM	aliz	🛣 🔺 💌 🔟 🥥
	🧰 folder	4	Apr 16, 2012 8:58 AM	aliz	🛣 🔺 💌 🔟 🥥
	i folder2	5	Apr 16, 2012 9:00 AM	🚨 liz	🛣 🔺 💌 ≚ 🥖 🥝
	🧧 folder3	6	Apr 16, 2012 9:10 AM	🚨 liz	🛣 🔺 💌 ≚ 🥖 🥝
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PUBLISHING

Publishing to a web server is available for pages, files, folder, image, and documents. For an *Asset* to appear live on the Web it **MUST** be published first.

TO PUBLISH ONE ASSET:

- 1. Navigate to the asset
- 2. Click the Publish tab
- 3. Leave all checked items checked
- 4. Click Submit to publish your content to the selected destinations.

TO PUBLISH AN ENTIRE FOLDER OF ASSETS:

- 1. Navigate to the folder
- 2. Click the Publish tab
- 3. Leave all checked items checked
- 4. Click Submit to publish your content to the selected destinations.

TO PUBLISH AN ENTIRE SITE (This will slow the CMS down. PLEASE BE COURTEOUS TO OTHERS AND DO NOT DO THIS BEFORE 4:30 PM):

- 1. Navigate to the BASE FOLDER
- 2. Click the Publish tab
- 3. Leave all checked items checked
- 4. Click Submit to publish your content to the selected destinations.

TO UNPUBLISH ASSETS:

- 1. Navigate to the asset
- 2. Click the Publish tab
- 3. In Options, change Publish Mode radio button to Un-Publish
- 4. Click Submit to publish your content to the selected destinations.

GOOGLE ANALYTICS

For each site entered into the CMS, Interactive Services will add a Google Analytics Account. The main site owner will be given access to view the Google Analytics through their main @siu.edu email address. To do so, a user must be logged into their @siu.edu gmail through a web browser. Go to http://google.com/analytics and then navigate to the Google Analytics information for the site.

You <u>will not</u> receive notification of the Google Analytics addition. If you would like to be added as a Google Analytics user for a particular site please fill out a ticket at <u>http://www.webservices.siuc.edu/ticket/</u> requesting access. Please include your name, email address, and website.

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RESOURCES

Hannon Hill Knowledge Base (HELP) - <u>http://www.hannonhill.com/kb/</u>

Interactive Services Help Ticket - <u>http://www.webservices.siuc.edu/ticket/</u>

Accessibility Information - <u>http://webstandards.siuc.edu/?page_id=35</u>

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May 28, 2012	