# Table of Contents

**Help is built-in** ..... 4
**No server stuff** ..... 4
**Share your News and Events and More** ..... 4
**Opening Conductor/Dashboard** ..... 5
Your URL for Editing ..... 5
Security Warning ..... 5
Entry Challenge ..... 5
Dashboard ..... 5
How to Add a Subpage ..... 5
How to Add a New Sibling Page ..... 5
Pages are just what they sound like—pages of your website. In order to work with them, you should know a few things about them: ..... 6
*Levels* ..... 6
*Templates/Styles* ..... 6
*Subpage or Sibling?* ..... 6
*Publish or Not* ..... 6
*List or Not* ..... 6
*URLs* ..... 6
*Saving Pages* ..... 6
*Formatting Text* ..... 6
Previewing Pages ..... 7
Preview Challenge ..... 7
Deleting Pages ..... 7
Restoring Older Versions ..... 7
**Uploads (formerly called Assets)** ..... 7
Add Files ..... 7
Editing Uploads ..... 8
Searching Uploads ..... 8
Inserting Uploads into Content ..... 8
*Rich Text Editor only* ..... 9
**Links** ..... 9
*Email Links* ..... 9
*Links to Pages Not on this Site* ..... 9
*Links to Same Page (Anchor Links)* ..... 9
*Links to Other Pages on this Site* ..... 10
**Redirects** ..... 10
**Tables** ..... 10
When to Use Tables ..... 10
Creating Tables ..... 10
**News** ..... 10
Categories ..... 11

Adding News Items ..... 11
Importing News Items ..... 11
**Events ..... 12**
Calendars ..... 12
Adding New Events ..... 12
**PDFs for the Web ..... 12**
**Photo Saving and Editing ..... 12**

Conductor is a proprietary web-based website content management system that enables non-technical users to perform content updates to their websites. Designed and developed internally by AgencyND, Conductor is intended to serve the needs of the majority of web projects on campus without restricting design. The result is a flexible, powerful system for creating and managing website content. As a web-based application, there is no software to purchase, nothing to install, and no server connections to manage. And because it ties into Notre Dame's authentication system, users can log in with their own NetIDs and passwords.

The AgencyND website is managed using Conductor, along with dozens of others. It currently hosts more than 5,000 pages and 9,000 image and file assets.

Conductor makes it easy to create and edit content on your website. You can add new pages in seconds.

# Help is built-in

We built Conductor to be quick to learn and easy to use. So there are helpful tools and cheat sheets built in throughout your admin area.

# No server stuff

Conductor is entirely web-based: no FTP, connection keys, or any of that junk. You can upload images and files right through your web browser.

# Share your News and Events and More

Websites aren't just pages. News and events let you post special content that can be automatically scheduled and archived. Visitors can subscribe to your news and events feeds so you can reach them on their own terms.

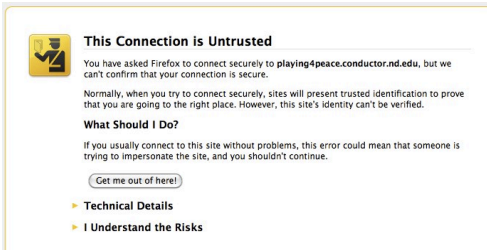
# Opening Conductor/Dashboard

## Your URL for Editing

Using the browser of your choice (Internet Explorer, Firefox, etc.), before launch, type **xxx.conductor.nd.edu/admin/login**, with xxx standing for the name given your site. (For example, the site for *Notre Dame Report* was **ndreport.conductor.nd.edu**. Since launching, it is **ndreport.nd.edu**. To enter the site after launch, type the same thing, but leave out **.conductor**.

## Security Warning

The first time you open your site in Conductor, you will receive a warning that the site registration (certificate) is suspect. Accept and permanently save the exception. (This will happen only while in development; once the site has launched, you will no longer encounter this certificate error.




## Entry Challenge

To enter Conductor and edit your site, enter your **Notre Dame UserID** and **password.**




## Dashboard

This screen includes

- Notes or communication the developers might want to pass along (product enhancements, etc.).
- The most recently edited pages (just to the right of the menu)—you can click on one of those pages and then click on **Edit** to bypass finding the page in **Pages**
- After launch, the analytics for your site New Pages




## How to Add a Subpage

1. Click on the **Pages** button on the left side of the screen.
2. Use the **Add Subpag**e key while highlighting the "superior" page. Note that subpages are "inferior" to the page you are highlighting. There are typically no subpages to the Home Page. All global navigation pages must be on same level as the Home Page, NOT subpages.

## How to Add a New Sibling Page

1. When you are on a page (not on the main page listing), to make a page "equal" to the current page, click on **Create a Sibling Page** under the **Page Actions**.
2. Title the new page with the header that is to appear at the top of the page. Be sure to use the proper template (most likely, Default).

## Pages are just what they sound like—pages of your website. In order to work with them, you should know a few things about them:

## Levels

On the **Pages** screen, you will see that there are sometimes triangles ►by a page title. That indicates there is at least one subpage. Click on the arrow, and you will see a list of any subpages. Note that the deeper you go into the site (subpage of a subpage, etc.), the darker the listing is.

## Templates/Styles

Conductor uses templates and style sheets to control how your pages will look. Generally, the only page using the "Home" template is the Home Page.

## Subpage or Sibling?

When you add a page, you can either make it at the same level of the page already existing (sibling) or a subpage of the page (one level lower).

## Publish or Not

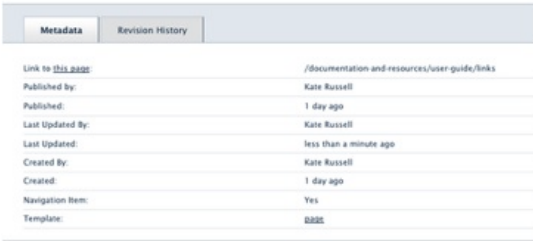
When you edit a page, you have the option of publishing it (so it will show up when someone accesses the site) or leaving it as an unpublished page (a draft). It will still be there if you don't publish it, but it will not be accessible, and links to it from other pages will not work.

## List or Not

You also have the option of excluding any page from the listing of subpages. If you have many subpages, this is an option for leaving the page on the site and accessible by link, but not showing up and "cluttering up" the navigation.

## URLs

When you save a page, the **metadata** is shown toward the bottom of the screen. This shows, among other things, the **URL** for linking. It will begin with a /. If you happen to change the title of the page at any time, the URL will remain the original unless you change it. To do so, click on **Advanced Options** under the text entry and enter the revised URL. Make sure to include a hyphen between words and use only lowercase.




## Saving Pages

Note that in the Rich Text Editor version of Conductor, when you save a page, you may get a screen saying your edits will be lost if you navigate away from the page. If you have hit the **Save** button, don't worry. Click on **OK**.

### Formatting Text

The newer version of Conductor uses Rich Text Editor (RTE), that allows a WYSIWYG (what you see is what you get) interface. You simply use the menu buttons above the text box for formatting your test.

### Previewing Pages

When you are editing, you will want to see what the page will look like on the Web. In order to do so, you must first **Save** the file. Then you can click on **Preview** under Page Actions, which will open a new tab or window showing your page.

### Preview Challenge




The first time you preview a page, you may receive a challenge that requests a userID and password. The ID is **conductor**, and the password is **preview**.

**Hint**: If you don't want a lot of extra windows or tabs open as you edit, whenever you want to see the changes in the Preview mode, simply go to your preview window/tab and click on Refresh in the browser toolbar.

### Deleting Pages

You can delete pages, but it's difficult to do by accident. To do so, click on **Delete** in the Page Actions box. When you do so, a special screen will appear, asking you to confirm that want to delete the page (and any subpages of that page). Once you confirm the deletion, the page will be gone forever.

### Restoring Older Versions

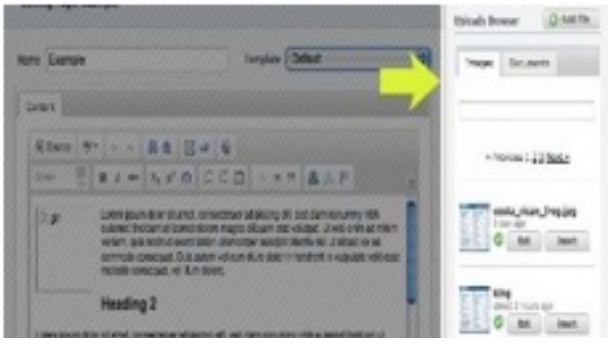


You have the option of restoring older versions of your page by clicking on the page (not edit) in the Pages window and scrolling toward the bottom where you will see two tabs: **Metadata and Revision History** and clicking on the version you want to restore. When you do that, the older version replaces the page you just saved and that page then moves down into the revision history as the next prior version.

# Uploads (formerly called Assets)

Conductor allows you to upload more than one image or documents at a time, directly from the page you're editing.

### Add Files

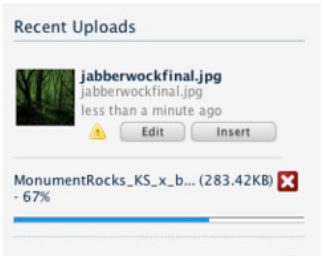



Uploads are images that will appear on the screen, or pdfs or other documents that will be downloadable by viewers. They are easily added to the website **while you are editing your content**.

While creating or editing a Page, News Post, or Event…

1. Click on the **Add File** button on the right side of the screen.
2. Browse to one **or more** files you want to upload and select them.

- On a PC you can *CTRL+Click* to select multiple files for upload.
- On a PC you can *CMD+Click* to select multiple files for upload.




3. While your files are uploading, you may continue working on your content. *While your files are uploading, you **cannot** upload more files.* Once the all uploads are complete, **you can again upload more files**.

## Editing Uploads

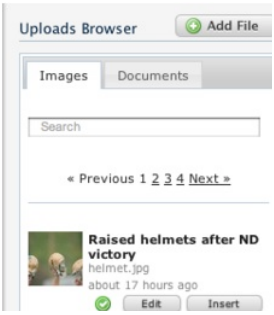
1. Click on the **Edit** button for an upload
2. Update the description
3. Update the tags (if appropriate)
4. Click the **Save** button




***We strongly encourage you to describe your upload***. The description will be used to help both screen readers and search engines understand what your upload is about.

We also encourage you to create tags for your uploads. Tags are useful for identifying files by topic (i.e. Catholic Peace Studies). They are kind of like keywords, but keywords that only administrators of your site can search on.

## Searching Uploads




The search will check for any matching tags, filename, file type, and description.

## Inserting Uploads into Content

- For the **Rich Text Editor**
  1. Locate and click the spot in the page where you want to insert the upload.
  2. Select the upload you want to insert and click on **Insert**.
  3. Click on **Insert**.
  4. Change the alignment if it is a picture.
  5. Click on **Insert into Page**.
- For the **Textile Editor**
  1. Select the upload you want to insert and click on **Insert**.
  2. Click on the file name and when the window opens, scroll to the bottom.
  3. If the upload is an image, **change alignment** to right or left by clicking on the appropriate alignment button. If it's a document (pdf, etc.), you don't have to worry about alignment.
  4. In the box below, click once to highlight the file. Copy the information.
  5. Click anywhere outside the upload window and go to the spot on the page where you want the upload inserted.

6. Paste the upload information and click **Enter**. There should always be a blank line before and after any upload to avoid problems with formatting.

### Rich Text Editor only

Picture sizes can be edited after placement by right clicking on the upload to bring up a small screen showing **Image Properties**. Click on **Image Properties** and then the **refresh** button (rounded arrow) next to the image size. You can then adjust the size of the upload. You can also move the upload by deleting it and pasting it in a new spot on the same page.

# Links

## Email Links

1. Click on the link button (lower menu bar, to the right)
2. Choose Link Type Email
3. Enter the email address and then the subject line and text, if any.



Note that it's a good practice to not put an email link in without an explanation as to what it is; i.e., don't type **myname** as a hyperlink without letting the reader know that clicking on that link will open an email. You could, instead, type **Send an email to me** or **Send an email to myname@nd.edu**. Typically, readers see a name as a hyperlink and assume that clicking on it will lead to a biographical page or other information, not an email.

## Links to Pages Not on this Site 

1. Click on the link button (lower menu bar, to the right)
2. Choose Link Type URL
3. Enter the URL you want as your linked page.

Note that if you don't want the URL to show up, you should type the text you do want to show up, highlight it, and then begin with step 1. This will make your highlighted text show up as the hyperlink, and no URL will appear on your page.

## Links to Same Page (Anchor Links) 

1. Creating anchors will allow you to link to a section in the same page as the link.
2. Type in the word/text that you want to be the destination, click before the word and then click on the **Anchor** icon in the bottom line, right side of the WYSIWYG menu.
3. A small window will pop up and ask for a name. Enter a name that can be easily identified and then click **OK**.
4. Now go to the text that you would like to link to be the anchor. Highlight the text and click the **Insert** icon. The window opens and you'll notice that there's a pulldown menu for Anchors. Choose the anchor that you just created and then click **OK**.

## Links to Other Pages on this Site



1. Highlight the text you want as your hyperlink.
2. Click on the link button (lower menu bar, to the right).
3. Change the Protocol to <other> and type in the shortened url of the page. For instance, the shortened url for this page would be: **/documentation-and-resources/user-guide/links**. You can find the url in the metadata listing toward the bottom of the page when in Conductor, but not in the editing mode.

# Redirects




You may not want to publish a new page to replace another, related page that contains the same information. In that case, you will want to make a redirect.

1. Click on the Redirects button in the left menu.
2. Enter the url for the page you are redirecting **from** in the top.
3. Enter the url for the page you are redirecting **to** in the Destination blank.
4. Save.
5. Test.

# Tables

## When to Use Tables

You may have occasion to insert a table or two in your website. However, rather than attempting to use tables to format your page (as you might have to in other content management systems), you should use tables only for tabular data. Contact AgencyND and request that a template be made for any formatting needs that might arise.

## Creating Tables




By clicking on the **Table** button (next to the lists in the menu), you can designate how many rows and columns you will want in your table, much as in Word.

# News

Conductor's news feature allows you to add news items, import items from News & Information, edit these items, and archive them. The feature also allows you to decide when the article is to be published and in what categories (for RSS feed subscribers).

# Categories

To start, you will want to decide what **Categories** you want. For instance, you may want New Staff and New Research as two of your categories. To set up categories,

1. Click on **News** and then **Categories** in the left menu.
2. Insert new category.
3. **Save**.

# Adding News Items

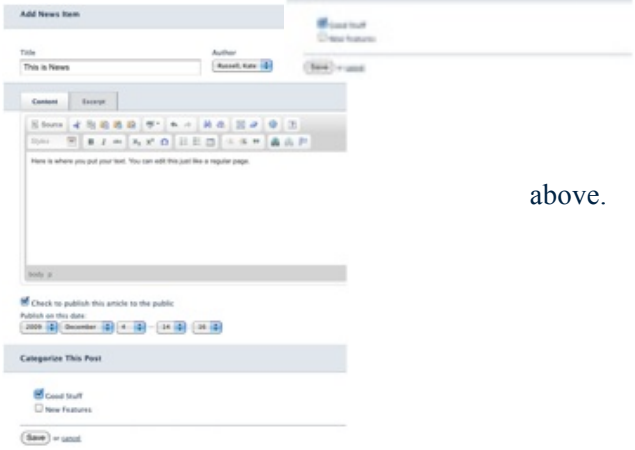
Once you've decided what categories you'll be using, you can add your first news item:

1. Click on **News**.
2. Add new item.
3. Add your title and text just as you would for a normal page.
4. The default setting automatically generates an excerpt (teaser text) from the first couple of lines of your new item. If you want other text, click on the **Excerpt tab** and type your text in the text box.
5. Click on **Publish to Public**.
6. If you want this item to first appear on a future date, adjust the date.
7. Mark which categories, if any, you want to designate.
8. **Save**.



# Importing News Items

1. Click on **News**.
2. Click on **Import News Item**.
3. Choose the article you want.
4. Click on **Import** (right side of page).
5. Once the item is imported, edit and post as above.



# Events

Conductor's events feature allows you to add calendar items and archive them. The feature also allows you to decide on calendar categories for events (for ical subscribers). Note that items will appear on the Events page or calendar until the event has occurred. Older events are archived.

## Calendars

To start, you will want to decide what **Calendars** you want. For instance, you may want Undergraduate Seminars and Public Events as two of your categories. To set up categories,

1. Click on **Events** and then **Calendars** in the left menu.
2. Insert new calendar.
3. **Save**.

## Adding New Events

Once you've decided what calendar(s) you'll be using, you can add you event:

1. Click on **Events**.
2. Add new event.
3. Add your title and text just as you would for a normal page.
4. The default setting automatically generates an excerpt (teaser text) from the first couple of lines of your new item. If you want other text, click on the **Excerpt tab** and type your text in the text box.
5. Click on **Publish**.
6. Mark which calendar(s), if any, you want to designate.
7. **Save**.

# PDFs for the Web

After you've saved your PDF, open it in Acrobat Pro and click on Command+D (Open apple+D). Change the "initial view" to full page, and then "save as" to overwrite your original file with the new one. This will make it so that your PDF will automatically open in full-page view once it's on the Web.

To reduce the size of large PDF files, use the Save As feature. Acrobat will automatically optimize the document for fast Web view.

Files can be further optimized; check the Adobe Acrobat tutorial on this.

# Photo Saving and Editing

Web photos, unlike when used for print pieces, do not have to be high resolution. In fact, 72 dpi is perfect!

Unless directed otherwise by AgencyND, save your photos no wider than 200 pixels.

All photos should be saved as JPEG files.

Generally, you will want the file size to be as small as possible, keeping in mind that you also need to keep the image quality. In order to do so, you will "optimize" the photo.

**Remember:** Always keep the original of the image (saving any revisions under a new name) so that you have the original for other uses that may arise.

You may want to try the Web-based product, Picnik if you don't have access to Photoshop. If you have Photoshop, open the file and crop it or adjust colors as desired. Save the file by clicking on **Save for Web**. This will automatically change the resolution to 72 dpi. Adjust the quality to as low as possible until just before the photo becomes too deteriorated, and then save the file.

# User Management

When you site is developed, there should be at least one role (typically Admin) that has been set up by AgencyND. You may find that you will want others to work on the site with or for you.

To add another person to work on your site:

1. Click on **Users** in the left menu.
2. Click on **Add a User**.
3. Fill in the information required. Note that the **NetID** can be retrieved from the directory. Make sure there are no extra spaces before the NetID when you paste it into the form.
4. If you have more than one **role**, choose the appropriate one.
5. Set status as **Active**.
6. Save.