

# **Web Stewardship Project**

# **Cascade Web Management User Guide**

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# **Web Stewardship Project**

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# Our Philosophy

Our digital presence across both web and mobile platforms reflects the identity and values of Sacramento State. It is often the first impression of our University. Hence, we aspire to provide our digital visitors with a pleasing, compelling, responsive digital experience that is consistent with the mission statement, values, strategic initiatives, and messaging of the University.

We have a very diverse audience made up of students, faculty, staff, parents, donors, the larger Sacramento area community, and other external audiences, including elected officials. The policy and guidelines described in this document will ensure that we have standards, processes, roles, responsibilities, and practices in place to provide satisfying, mission-critical customer experiences, and to convey across all touch points a consistent look, feel, and voice for Sacramento State. A unified website with consistent, on-brand messaging and relevant, easy-to-find content strengthens the University, supports our constituents, and results in satisfying customer experiences that translate to ongoing engagement.

It is important to note that all sites falling within the csus.edu domain, including Sac State Mobile (the campus mobile app), are strategic assets of the University. Department staff serve as caretakers of their websites, experts in their content, and stewards of our campus identity.

# Our Objective

The primary objective of this document is to provide collaborative, centralized stewardship for the ongoing development, deployment, delivery, and maintenance of the Sacramento State digital presence through standards, processes, roles, responsibilities, and practices.

This objective will be pursued with the website's underlying strategic priority in mind: to facilitate a user experience that will develop a lasting digital relationship with all visitors— particularly students and prospective students—providing them with the information they need quickly, easily, and enjoyably.

The goals for all stewards of the campus website and mobile app are to:

- provide a consistent look for official University web pages; one that represents the Sacramento State brand
- create fresh, relevant content specifically designed to engage distinct audience segments
- organize content in a way that intuitively presents information to its many audiences to facilitate a satisfying online experience.

Members of the Sacramento State community can be stewards of the campus website by understanding and executing these best practices.

Stewardship of the Sacramento State website will be founded on the following guidelines and principles:

- **Accuracy.** Information presented on the website will be factually accurate and as current as practical.
- **Relevance.** Users of the website will quickly and easily find information that is relevant to their reason for visiting. Backed by analytics and user feedback, navigation will be intuitive.
- **Simplicity.** The information on the site will be concise and understandable by the broadest segment of the intended audience.
- **Compliance.** The website will meet all applicable state and federal regulations, including those regarding user accessibility.
- **Consistency.** Sacramento State will have a singular visual and writing style across its website that integrates with the University's brand identity and relies on best practices for writing web content. Where applicable, authoritative sources for content will be identified to prevent duplication of information.

- **Proactivity.** The staff who maintain the website will strive to anticipate changes in their scope and plan to reflect those changes online in as close to real-time as possible.
- **Equity, Diversity & Inclusion.** Sacramento State is a diverse campus committed to education equity and the creation of an inclusive campus environment. Our website will reflect these values.

# Website Administration

## Web Stewardship Team Structure

A Web Stewardship Team will be established and will include representatives from the various campus divisions to form a shared governance group whose work is informed by subject matter experts through transparency and widespread consultation.

The Web Stewardship Team is responsible for setting direction and recommending standards and practices for the University's website and mobile presence. So that guidelines and standards are set with a full understanding of the issues and impacts involved, decisions appropriate to the jurisdiction of the Web Stewardship Team will be reached by consensus.

Consensus is achieved through discussion, understanding the benefits and limitations of decisions. If the group cannot reach consensus, the options will be presented to the Chief Information Officer and the Provost with a recommendation for resolution. The

Web Stewardship Team will review opportunities to communicate relevant information to appropriate audiences and take input from various campus stakeholders.

The Web Stewardship Team will disseminate that information to their staff and department members, and make projects, initiatives, and decisions available on a regular basis.

The Web Stewardship Team will accept ideas, requests, problems, and concerns.

## Responsibilities of the Web Stewardship Team

- In response to the feedback from and needs of web visitors, provide oversight of and set strategic direction for [www.csus.edu](http://www.csus.edu) and the Sac State Mobile presence.
- Establish appropriate standards, processes, and procedures to guide current and future website development.
- Evaluate effectiveness, content, standards, and practices for technology and editorial components using data analytics and best practices and standards in higher education.
- Clearly identify any issue or problem areas, apply ideas for resolution and evaluate their effectiveness through pre-determined success metrics.
- Suggest global changes to taxonomy, structure, branding, look and feel, navigation, styling, etc., as needed.
- Ensure compliance with all legal and regulatory standards, including accessibility, security, FERPA, etc.

- Ensure site quality and content integrity and consistency.
- Recommend additional templates or changes to existing templates.
- Facilitate and resolve non-compliance issues.

## Roles/Permissions

In general, the ability to update content should be delegated to those best positioned to ensure its timeliness and accuracy. IRT is available to help provide new pages, sites, and modules to meet specific needs, and to consult on web strategy, but the responsibility for maintaining accuracy and completeness of information rests on those designated with roles and permissions. There may be multiple content editors within a division/department.

### The responsibilities for each role are as follows:

#### Content Publisher

Publishers will have access to edit, publish and delete content for their authorized areas. Publishers will be appointed by the Vice President of each area. Information Resources & Technology and University Communications will continue to share the responsibility of managing the top 2 levels of the CSUS site as defined in the site map.

- Reviews work of content editor(s).
- Authorized to publish content live to site.
- Final gatekeeper of content at the non-administrative level.
- Responsible for assigning and managing content editors.
- Notifies IRT of any new content editors as needed.
- Ensures that all “links” are live, tested, and appropriately implemented.
- Remediates misspellings and accessibility issues, and updates outdated content.
- Trained in WCM, (website improvement and accessibility software), and writing for web best practices. May train content editors.
- Responsible for maintaining accuracy, accessibility, voice, and tone.
- First point of contact with Administrators for remediation.
- Gathers, creates, and organizes/rewrites content drawn from additional subject area experts.
- Ensures look, feel, and tone aligns with University messaging, brand, and identity.

#### Content Editor

- All as above, but requires the approval of a Content Publisher for changes to be pushed to the live site.

**Note:** *Both Publishers and Editors must submit a ServiceNow ticket to request new pages and for pages to be renamed*

## Administrators

Responsible for the overall oversight and execution of the guiding principles of the campus website. As a collaborative team, IRT Web & Mobile Services and the Office University Communications will work in concert with the Web Stewardship Team to support the integrity of the campus website. In the event areas of campus need additional content approvers, administrators can approve content for publication.

- IRT Administrators are responsible for the overall look, feel, and tone of the campus website.
  - Ensure that the user experience is consistent and operates in the best interest of the site users.
  - Facilitate identification of authoritative content owners and communicate to editors/approvers so that information is accurate and timely.
  - Provide training on the WCM and Siteimprove.
- University Communications Administrators are responsible for the key messages, voice, and tone of the campus website.
  - Ensure that web content follows the campus standards for look, feel, tone, brand and identity.
- Academic Technology Center
  - Provide training in best practices for writing for the web.

## Provisioning of Roles

It is imperative to keep content management roles and permissions accurate. When people move within the University, requests should be submitted to IRT to de-provision those users from any systems they may have managed. Any changes to content editor or approver roles should be communicated to IRT.

## Training/Education

Only content editors and approvers who have been trained in the WCM and **Siteimprove** will be given access to the WCM. Training can be provided in a large group upon request or on a one-to-one basis. Online training will also be available, while a user group will also be created as a means to promote collaboration. The goal of training is to provide just-in-time support to our campus to ensure the integrity of the end user's experience.

## Requesting Content Updates

Content updates can be submitted to the Web & Mobile Services team by:

- Downloading the appropriate **template** to consider content changes.

- Specifying where content should be added, deleted, or moved.
- Opening a **service ticket** and attaching the template with changes.

## New Website Section Requests

Requests for new sections (T4 only) can be submitted to the Web & Mobile Services team by:

- Downloading the appropriate **template**.
- Organizing the content into the template.
- Opening a **service ticket** and attaching the template with the request.

**Note:** *Website sections that alter the site's architecture must be vetted by the Web & Mobile Stewardship Team.*

## Process Questions

Please contact the IRT Service Desk team for questions about submitting a service request or schedule a consultation for **in-person consultation** on content development.

## Submitting New Design, Feature, Functionality, or Website Requests

Any requests to add new design elements, features, functionality, or develop new websites on the csus.edu domain can be routed to the IRT **Project Management Office**.

These requests will be routed through our project management process, including vetting by the Web & Mobile Stewardship Team.

Requests of this nature can take up to 2 weeks for a response.

## Custom Web Requests

Even though some departments may be able to make financial investments for web or mobile work on their behalf, all web and mobile development leveraging the csus.edu domain must be approved by both the Division Vice President and Web Stewardship team.

It is possible to have a special project site or feature request. Customizations of this nature can be reviewed and supported by IRT Web & Mobile Services. For more information, please **submit a request** to consult with one of the team.

## Measurement

Google Analytics has been embedded in all site pages, so campus stakeholders wishing to track page views do not need to embed codes on their own. Submit a request to the Web & Mobile Services team to receive your area's information.

## **Web Content Management System**

At other campuses as well as in the private sector, the acronym CMS is used to designate Content Management System. Our Student Information System is referred to as the Common Management System (CMS). Therefore, the Web Content Management System will usually

be referred to as WCM. It is also sometimes referred to by the product name (Cascade) or the vendor (Hannon Hill) that provides it. The advantages of using the campus WCM are numerous, including delivering an accessible, consistent user experience within our campus branding standards.

Our web content management system provides varying levels of access and approvals, allowing tiered management of content posted to the site.

## **Remediation**

If accessibility errors, blatant spelling mistakes, broken links, or factual errors are identified during initial or weekly scans of any sites hosted on the csus.edu domain (or by manual review), the IRT Web & Mobile Services Team will contact the editor/approver responsible to request remediation.

In the event the issues are not remediated or the editor/approver requests support, IRT will update the page(s) accordingly. If there is a recurring issue with responsiveness to remediation, editing/approval privileges may be revoked.

# Information Architecture

The information architecture is the underlying structure of the content on csus.edu.

## URL Structure

A well-constructed web address tells the owner, editor and visitor exactly where a page “lives” in the context of the site. The URL guidelines for official University web properties follow

a search-friendly naming convention by spelling out acronyms and inserting hyphens for spaces. Pages that are created for you by web services should be named correctly out-of-the-box. If you follow linking instructions using the “Internal” method, Cascade will handle constructing search-friendly URLs for you.

### Level 1: Homepage

Editing capabilities are limited to website administrators.

### Level 2: Main Information Architecture

Editing capabilities are limited to website administrators. This level of the site is included in main navigation and can only be modified by administrators.

### Level 3: Sub Information Architecture

Template 3 is a sub-site, directly related to the core information architecture. Complete editing capabilities are limited to website administrators. This level has some elements that can be modified by content approvers.

#### Types of Pages Using A T3 Template

- Organizational: College of Natural Sciences & Mathematics
- Programmatic or Informational: Housing

## Level 4: Page content and sub-site architecture

Level 4 is the gateway to the more granular, content-rich areas of the website. The Template at Level 4 is very flexible so as to provide growth for content areas. Template 4 provides the home page to support the footprint of a new sub-site. For example, a Template 4 would hold a department, stand-alone center, or unit website.

### Types of Pages that use a T4

- Identity: Department of **Biological Sciences**
- Programmatic or Informational: Print & Mail Services

## Level 5: Page content

Level 5 is for pages that have heavy content. In general, sub-sites with Level 5 content should use the functionality at Level 4 to create a gateway to the more detailed content. The Template 5 page type should be used for Spotlight content featured in T3 and T4 pages.

### Template 5 has the following elements:

- Organized in sub-sections for chunking content for end users
- Represents the deepest level of site content

### Interface Options

- **Single column** with the option of including wide tables
- **Two column** (without special image-specific formatting), with the option of including tables (3 column max)
- **Two column Showcase:** The second content section on this page type must use an image or opt for the standard two-column layout.

# General User Interface Overview

## Page Banner

The T4 page banner contains two headlines and supports a large background image which will also be applied to all child T5s beneath it in the same WCM directory.

To edit the banner, navigate to the first content area beneath the t4-page header, labelled Hero – Main Banner. Click the ( > ) button to expand the panel.

- The field labelled “Header - Center or Department Name” will become the large ‘Headline 1’ for the page. “Subheader - Parent Organization (College, Division, etc.)” is the page’s ‘Headline 2.’
- **Banner Image:** Banner images should be sized to roughly 2000px x 1000px wide at 144ppi. A JPEG Quality setting of 60% will reduce the filesize without affecting visual quality in most cases.
  - Upload the image to the `_internal > _images` directory in your page’s directory.
  - Attach the image to your banner by clicking the This applies the top half of the image to the banner. You can later apply that same image to the ‘hornetcomb’ area to apply the bottom half; thereby completing the picture.

— If your page doesn’t use a bottom honeycomb area, you may opt for an image closer to 2000 x 500px

## Main Navigation

Unlike previous versions of csus.edu, the main navigation is not a literal reflection of the site’s structure but instead provides a method to create visual pathways for end users to find the most highly-sought content. It acts as a guide for site visitors, but it is only one method to find information.

## Breadcrumbs

Breadcrumbs are a form of secondary navigation which shows end users where they are within the overall website. Taking a cross-pollination approach that emphasizes links to authoritative content necessitates a visual cue for users to understand they’ve moved to another area of the

site should they leave one section and move to another.

With the rise of search as means to locate landing pages rather than the “front door” of a home page, breadcrumbs are becoming less necessary in user interface design, but instead serve to orient users relative to where they might come in.

## Spotlights

A Template 3 page may link to 4 maximum supporting pages (Template 5) can be linked from the spotlight section. Spotlights can link to any CSUS site or off-site (like The Bee or non-WCM CSUS properties) content. Spotlights cannot link to documents such as PDFs, Word files or external links

### Content at Level 4 includes:

- One main landing page supporting images, sidebars, table data, vertical calendar feed and more.
- A maximum of 4 Supporting pages (T5s) that can be linked in multiple ways, depending on the strategy and nature of the content

## Hexagonal “Hornet’s Nest” Navigation

Hornetcombs link ‘up and out’ from the T4 to services and tools within the immediate college or division parent site, or other campus resources like Financial Aid and the Advising Office. Every T4 page comes equipped with a default set of options, but these should be optimized to your particular userbase. The entire Hornetcomb area can be hidden via the Show/Hide radio button.

For pages with Hornet’s Nest, choose a 2000px wide photo that will reveal the bottom half of your banner image behind the hexagons.

## Connect Bar

The connect bar consists of up to four areas

- **Find Us:** Building, Room and regular business hours.
- **Contact Us:** A main office phone number and general email contact address.
- **Meet Us:** Links to area staff and faculty directory page.
- **Follow Us:** The block supports up to four social media platforms. Simply paste the link to your page/profile and the icon will populate.

Leaving any of these blocks blank will cause them to hide themselves from the layout.

# Template Functionality

The templates are built with enough design flexibility for content approvers and editors to apply appropriate styles to content while still maintaining the integrity of the user experience.

The following guide shares information on best practices in applying available style to content, including step-by-step instruction on how to use the features template of the template.

## Template 3

A Template 3 would be a college, division, or a high-traffic, or highly-informational area like Housing. To qualify for a Template 3, your content must have the following elements:

- Domain contains enough content to require sub-sites (at Level 4) to properly display everything.
- Includes standard pages:
  - One main landing page (Template 3) with up to 4 content areas. These content areas support optional content types (as described under Template 4.) See table on page 15 for supported content types by box location.
  - Optional horizontal calendar feed
  - One “Meet Us” page for sharing area identity through people and other supplementary material e.g. mission, values, philosophy, strategicplan.

## Template 4

- Domain holds enough content to justify as a sub-site of its parent T3 page and the overall website information architecture
- Provides a home page to a total sub-site footprint of 6 pages:
  - One main landing page (Template 4) with 4 content areas supporting multiple content types.
  - Additional supporting and spotlight pages (Template 5)
  - One “Meet Us” page for sharing area identity through people and other supplementary material e.g. mission, values, philosophy, strategicplan

The template contains 4 content quadrants. With the exception of the **Top Left Box**, variable styles and functionality can be applied to: **Top Right Box**, **Bottom Left Box**, and **Bottom Right Box**. If content is entered into a variable content quadrant and a different variable is applied, content that won't fit that functionality will disappear from view. The content is not deleted but will not be visible. See table on page 15 for supported content types by box location.

The intention of this built-in functionality:

- Guides the appropriate application of style and functionality to content;
- Provides content creators flexibility; and
- Maintains a consistent end-user experience.

## Top Left Box: Introduction

### Content Use

The Top Left Box is the introduction to your overall page content. It may have the need for an important call-to-action.

T4 'home pages' begin with the subheading "About Our Programs" and end with a button (link styled with the `.button-cta` class) labeled "Explore Our Degree Opportunities". This button should always link to the most appropriate page on [catalog.csus.edu](http://catalog.csus.edu). *Some exceptions for Centers and non-Academic sections are allowed as they make best sense.*

### Applying Styling

1. After your first sentence of introduction text, press return to start a new paragraph.
2. After your last line of introduction text, press return to start a new paragraph.
3. Paste or type your Call-to-Action verbiage into that new paragraph at the bottom of the text field.
4. Select that entire string of text, then click the \*Link\* button, then the \*External\* checkbox.

— On Academic Pages, this call-to-action label should always read "Explore Our Degree Opportunities"

5. Choose the External Link Source checkbox.
6. Paste the link to the catalog page into the *Link* field
7. Before clicking OK button or deselecting linked text, choose *button-cta* from the *Class* pulldown.
8. Click OK. (You will get a warning message about http vs https that you can ignore.)

**Note:** *Images are not intended for this block and will be stripped out by the WCM.*

Content Type	Top Left	Top Right	Bottom Left	Bottom Right
General				
List/Sidebar				
Showcase				
Calendar				

Table			
Video			
Image-Only			

## Variable Content Types: Boxes 2, 3, 4

### Applying Functionality

Each content area consists of a headline and body content fields. The headline field creates a Headline 2 for the page content area, which helps establish the proper accessible page sectioning.

#### 1. General WYSWYG Text Area

The General content type is available for all four blocks.

1. Select Content Type: *General* from the dropdown.
2. Editors may use Headline 3 (or successive pairs of Headline 2 followed by a 3, if there is another complete topic), both list types, paragraphs, bold, italic and links to style content in the WYSWYG editor. (Other options available under the *Format* dropdown are set to revert to paragraph styling.)

#### 2. List Only (Sidebar of buttons)

Sidebar of buttons are available for both right-hand side blocks. These best support lists of 7-10 links with subheaddividers.

1. Select Content Type: *Button Sidebar* from the dropdown.
2. To set the main navigation heading, enter the label under the first field labeled List Heading (Subject).
  - An editor can add an Item (Link Label and URL) within List, then press the (+) button to at right to add another list row.
  - Link types can be internal (within the WCM, including PDFs) or external URLs. External URLs may still be within the Sac State sphere of influence, but simply outside the WCM (such as catalog.csus.edu). Use internal links wherever possible as the WCM is smart enough to maintain those types of links even of their destination filename or location changes.

To nest a subhead directly beneath the list sidebar's main header, remove the label and link for the first Item within List field and enter a subhead text into the Header for Subsection field.

If you'd like to set an image behind the sidebar of buttons, this content area and type supports *Background Images*.

**Note:** Any existing text styled otherwise will be hidden. Additionally, any unlinked list item will not align correctly. If you need unlinked text in this area, you should use the General layout.

#### 3. Showcase (One Button)

Only Block 2 supports this content type.

1. Select Content Type: *Showcase* from the dropdown
2. To style this block properly, repeat steps 1-2 from the instructions for *Default Button*. Instead of pasting an external link, choose the *Internal Link Source*. Browse to the appropriate page on csus.edu.
3. As with a Default Button, choose *button-showcase* from the *Format* pulldown prior to clicking the OK button or deselecting linked text.

4. This layout requires an image set behind the single button. This content area and type supports *Background Images*.

**Note:** *If you need additional text or links in this area, you should use the General layout. If you would like to add more than 2-3 buttons, choose Button Sidebar. Any other existing text will be hidden upon selection of this option.*

#### 4. Image Only (no text)

1. Select Content Type: *Image Only* from the dropdown.
2. This layout requires an image. Upload or Browse within the Background Image tool. This image should be decorative in nature and not convey meaning.
3. If you want to include your logo on your home page, it can be included best using this content type. Select the *Is this image a logo?* Checkbox.

**Note:** *If you need additional text or links in this area, you should use the General layout. If you would like to add more than one button, choose Button Sidebar. Any other existing text will be hidden upon selection of this option.*

**Note:** *If you prefer to include an image with spacing around it in order to see the entire photo, choose instead the General format and insert the image “inline” via the content editor.*

#### 5. Events Calendar Feed

1. If this block was pre-populated, change the field labelled *Header Box 2* to something more appropriate like “Department Calendar”. The headline is the only elements that will carry over from any previously entered text.
2. Set a background image to go beneath (optional)
3. Select Content Type: *Events Calendar Feed* from the dropdown. Enter the Trumba RSS URL in the *Feed from Trumba Calendar* field.
  - <https://www.trumba.com/calendars/sac-state-academic-calendar.json>
4. Add the main Trumba calendar URL link to the *Events Link* field.
  - <https://www.trumba.com/calendars/sac-state-academic-calendar#/?i=6>

#### 6. Table

Can hold one heading and a single table with 2 columns. Tables should be used to display data (textual or numerical).

#### 7. Video

**Note:** *It is important to understand the differences between Link and Embed functionality in these two systems, or the link will not work properly in the content quadrant.*

- YouTube code must begin this embed code stem:  
<https://www.youtube.com/embed/...>

- This is not the link you see in the browser address bar. You must instead use the link provided by YouTube's Share function and choose the URL shown under the Embed option.
- Mediasite code must begin with this string:  
<https://csus.mediasite.com/Mediasite/Play/...>

**Note:** Any video on csus.edu must be captioned. Uncaptioned videos will be removed immediately until remediated. YouTube videos create their own captioning by default.

# General Functionality (Templates 3, 4 & 5)

## Buttons

### Styling

There are two styles of buttons you can apply to anchor elements in select WYSWYG locations.

- *.button-default* can be used in light backgrounded contexts.
- *.button-cta* is to be used only against dark backgrounds where a single call-to-action is needed

#### 1. Single Button

A single button is the easiest to implement.

1. End the Intro Block by entering two returns, then typing the button label you wish to add. This creates a paragraph by itself.
2. Select that label text, then click the *Link* button and select the *External* or *Internal* checkbox.
  - External links (full address, most commonly outside of csus.edu) can be typed or pasted into the *Link*field.
  - Internal links are added by navigating to the pages or files inside the WCM.
3. Before clicking the *OK button* or deselecting linked text, choose *button-default* from the *Class* pulldown.
4. Click OK.

#### 2. Double Button (two wide)

If you have 2 similar buttons, you can wrap them in an unordered list with the format classes of *ul-button-2wide* or *ul-button-stack*. Apply *.button-default* to the anchor text inside them.

1. End the Intro Block by entering two returns, then typing the button label you wish to add, press return again and type the second button label.
2. Next, copy the two label lines and paste it below.
3. Select both label lines in the first set and convert the two label 'paragraphs' to an unordered list by clicking the bullet button in the editor. With the list still selected, choose *Formats > Custom > ul-button-2wide*.
4. Now, select the first label of the second set and add a Default Button-link as described above.
5. Repeat for the second label text.
6. Lastly, select each linked label text individually, then copy-and-paste over the

bulleted copy.

7. Remove any extra returns above and below your buttons.

### 3. Multi-Button Stack

If you have more than two buttons for a single content area, or if your button label text is moderately long and might look better as wide as the column of text above it, use a Multi- stack variant.

Follow the steps for Double-Button, but in Step 3, select *Formats > Custom > ul-button- stack* instead.

## Upload an Image or Document

Each tier of the site includes a folder called `_internal`. You should place your image inside that folder's `_img` subdirectory, and all PDFs, et al into the one named `_documents`.

### 1. Insert an image into the current page:

1. Click into the text field of a General content type section, then press the image button. The Internal option will be selected by default. DO NOT link to domains outside of csus.edu.
2. Click the blue button labelled Choose File. In the dialog box, you have 3 options:
  - Recent: Choose from the last 16 files you have browsed or uploaded.
  - Browse: Navigate to your `_internal/_images` folder to retrieve a previously uploaded file.
  - Upload: Drag a new file from your desktop, or click choose to navigate to the new file on your local computer. Before clicking the large blue Choose button in the upper right, make sure you are adding it to the proper location by navigating the folder structure beneath Select a placement folder.
3. After clicking the large blue Choose button in the upper right, you *must* add a meaningful image description or check the “This is a decorative image...” box.
4. The Dimensions, Constrain, Class and Advanced tabs/fields are not used.
  5. Click OK to finish inserting your image. The image will automatically fill the width of its container block, minus margins.

### 2. Add an image or document to your site for later use

1. Click the hot pink Add Content button at top left of the Cascade header.
2. Choose the Default folder, then the File item within it.
3. Drag your file onto the dashed box in the middle of the screen. Doing so will enter a required filename. It's recommended that you:
  - Name the file something that makes sense for later reference.

- The WCM enforces proper file naming, converting spaces to hyphens.
  - If you are uploading a file from the old website, convert %20 in your filenames to hyphens.
4. Navigate Placement Folder to your `_internal/_images` or `_internal/_documents` folder to ensure it's being uploaded where you expect and can easily find it again.

Your file is uploaded to the Cascade server, however, it will not appear on your page until you insert it into one. What's more, until both the page and the image are published, you will not be able to see your addition. Be sure to 'check your work' by opening the page on the live server to make sure your image shows up.

# Template 5

## T5 General Application

The T5 template is made to be very flexible regardless of the three layout modes chosen.

Every T5 page requires a page title, which appears in the white content area (not in the banner as in prior tiers) and an *Intro Block*, which can hold an unlimited and variable amount of information. However, if you would like to use the template to your advantage, you will want to structure your page differently.

The most versatile way to treat the *Intro Block* is to include an amount of content akin to the first top content block used on a T4 page.

Add a new *Section For Content* beneath the *Intro Block* for each complete 'thought' thereafter. *Section For Content* include a Sub-headline and Body Text text fields. Note: You MUST use the provided headline field for each content block.

If you want to link to other information in any of these blocks, you can include inline links, or end the block (except for Table areas) with Default Buttons.

## T5 Template Types

1. **One column:** The standard layout, all blocks and sections stack vertically in the order they are added to the page at the full width of the content area.
2. **Two column:** If a one-column layout takes more than 3 or four screenlengths to scroll to the bottom of, you will want to try a 2-column layout. Using the Intro Block and Sections to determine breaks, each block stacks from left to right down the page in roughly half the width of the content area. Images should be sized between 600-1000px wide.
3. **Two column showcase:** When choosing a 2-column layout, only use the showcase option if the second box will contain an image. Stacked box layout as in the regular *Two column* type, but made specifically to display images more elegantly. Images can be sized at 1000px wide, images smaller than the column width will align to the left.

**Note:** 2-column layouts are designed to sit side-by-side. This may result in long gaps between rows. Reorganize them if you can to tighten up the layout and make it easier to scan the page.

## Functionality

### 2col Showcase: Embed an Image

When the 2col Showcase pagetype is selected, images should be added using the

(optional) *Image for this Section* internal navigation button at the bottom of each *Section*. Your subhead and and text will automatically align below the chosen image. The image will fill the entire column width.

### Tables

You may also add a table by selecting the *Add Table to this Section?* checkbox at the bottom of each *Section*. Because of the complex nature of tables, the Table area is the one WYSWYG editor window where editors have access to the source code editor. Table cells can also hold bold, italic and inline links. *Do not check off table if you have no table data to display.*

The tables on T5 pages are set to “non-wrapping whitespace“ to preserve the most common types of information on one line (i.e., COMS 2, 4-6 p.m., etc. stay on one line). If your information is long, like a bio, you may:

- Reconsider if a table is necessary at all. This information may work better in a more general format
- Submit a ServiceNow ticket requesting Web & Mobile Services write an exception for your page.

# Meet Us

The Meet Us page templates, while they can be considered T5, have the very specific job of displaying faculty and staff directory information.

The manual version requires considerable amount of work to build, but is modular and easy once you get the hang of it. This method is far more flexible: customized information, such as Research Interests, Office Hours and more, as well as a headshot photo, can be included.

Like other T5 pages, Meet Us page template allows for an introductory block of text (General WYSWYG text area) that will be placed between the Group Title (see below) and the rows of profile blocks.

- **Display Name:** likely pre-populated as “MeetUs.”
- **Description:** This is an important and required block of text that displays on search results pages. “A directory of faculty and staff working in the Department of \_ at Sacramento State University” or similar is fine.

Manual page directories include a folder called `_internal` in addition to its index page.

There are two main elements in these pages related to the two subfolders requiring separate steps when creating these pages:

1. Photos (`_internal > photos`)
2. Text Content by Group (`_internal > _groups`)
3. A third item in the `_internal` folder, called `block-meet-us-index`, is not used and should not be edited.

## Adding Photos to Manual Meet Us pages

1. Download, or create a new, collection of relevant headshots for your area. These images are cited in the WCM as having dimensions of 180x130px but will be scaled in the page accordingly with varying success.
2. In the WCM, right-click *\_internal > photos* folder, and choose View from the menu list.
3. At the top of the page, choose *Add Content*, then *File*. Double-check that the *Placement Folder* is in fact the photos folder in your specific Meet Us area of the WCM folder structure.
4. Select all of the photos in the collection gathered in Step 1, and drag onto the area outlined with a dash. The Filename field will autocomplete, and naming inconsistencies will be re-written.

## Adding Groups to Manual Meet Us pages

1. You should start with 1-2 default groups in your *\_internal > \_groups* folder (group1, group2, etc).
2. The names of these folders don't display to public visitors, but it may be useful to (right-click the group folder) to rename them something more meaningful. Staff, Full-Time-Faculty, Part-Time-Lecturers, etc., may be useful.
3. Open your first group folder. You will find a 'block' file (the WCM's term for a partial page, or snippet) inside named surname-name.
  1. Clicking on the block in the sidebar will preview the default information included.
  2. Right-click on the block in the sidebar to change the blocks name to something more meaningful. (ex: smith-mike)
  3. Choosing Edit in the upper right of the WCM window will allow you to make edits, including linking to one of the headshot photos uploaded in the previous step.
  4. Submit and publish your block.
  5. For each additional member to include on this page, select the block in the sidebar, then right-click > Copy to the same folder (if belonging to a similar group) or to an adjacent group they would best be affiliated with.
  6. Repeat step 2 and 3 for each person.

The WCM creates 'breadcrumb' anchor navigation at the top of the page content area based on the Group Names you have specified. This allows for large orgs with many groups to be more easily navigated by providing a one-click 'jump to' link rather than requiring the user to scroll-and-hunt.

# Best Practices for User Experience

## Accessibility

Of the 90-odd accessibility flagged by the campus' accessibility scanning tool SiteImprove shortly after launch, only 10 fall within Web Services' purview. The others largely stem from editors' lack of training or willingness to work within the established guidelines. In simple terms, a broken website is more often not an IT issue, but one involving the content that the technology supports. In order for the university to remain in compliance with Section 508 rules, everyone involved must strive to ensure all public-facing web, mobile, and digital content are accessible to every audience that uses it.

IRT supports Siteimprove for all campus content editors and approvers to use in auditing the accessibility of their pages as well as broken links and misspellings. As a web content manager, you may request access to the **SiteImprove** tool to identify, report, and repair or replace inaccessible websites and digital content in compliance with **Section 508 Guidelines** and **WCAG 2.1 AA** criteria. Siteimprove runs automated, weekly audits of all CSUS-hosted web content to identify problems.

## WCAG 2 Rules of Thumb

### 1. Perceivable

- Create content that can be presented in different ways, including by assistive technologies, without losing meaning.
- Make it easier for users to see and hear content.
- Each page should have a unique title that contains the information needed to distinguish it from other pages and makes it clear what users will find on that page.

### 2. Operable

- Make all functionality available from a keyboard.
- Give users enough time to read and use content.
- Do not use content that causes seizures.
- Help users navigate and find content.

### 3. Understandable

- Make text readable and understandable.
- Make content appear and operate in predictable ways.
- Help users avoid and correct mistakes.

#### **4. Robust**

- Maximize compatibility with browsers and user tools.

The following tips will help you ensure that any content created follows the ATI rules and WCAG 2.1 standards:

- Content should be clear and concise. Formatting and language should be formatted simply.
- Relevant headings. Ensure that the headings on your page contribute to the understanding of what the page is about and help to separate the page's structure into meaningful segments.
- Shorter titles are better: A good rule of thumb is to keep it between five and 15 words.
- Meaningful link labels. When creating hyperlinks on pages, create link text that explicitly describes what users will find if they follow it. Avoid "Click here" or "More information" and instead link text such as "Link Purpose (In Context) 2.4.4."
- Actions with clear instructions. If your page has instructions, error messages, or similar features, provide explicit descriptions of what needs to be done, avoiding technical jargon.
- Alternative text for multimedia elements. Every image should have alternative text that accompanies it explaining what function or information the image contains. If the image does not serve any purpose other than decoration, a blank alternative text is considered a best practice. DO NOT use the filename of the image as its alternative. Videos should have transcripts and captions to make them usable for all individuals. Audio content should have transcripts.

## **Accessibility of Linked or Embedded Content**

All content for the University must follow the rules of the Accessible Technology Initiative (ATI) of the California State University system, which states: "It is the policy of the CSU to make information technology resources and services accessible to all CSU students, faculty, staff and the general public regardless of disability."

This means that all programs, activities, and services should be available to anyone seeking them.

### **Video**

Videos are an important component of telling the Sacramento State story, and like other materials that tell our stories – brochures, handbooks, web pages, etc. – they need to adhere to University brand standards and be consistent in style, tone, and message.

All videos posted on [www.csus.edu](http://www.csus.edu) must be ADA and 508 compliant. All videos that appear on the Sacramento State website must be captioned. This applies to videos produced internally and externally. Any video embedded on csus.edu that is not captioned may be removed from the site and the owner notified.

## Best Practices (continued)

Content editors/approvers can use our campus video platform, Mediasite, where they can request captioning directly in the interface. For more information on Mediasite or support, users of the system can work with the **staff in IRT**.

## Portable Document Format (PDF)

PDF's are the preferred file type for downloadable content. The PDF is a ubiquitous standard that is generally print-friendly. PDF's are also more complex for a user to alter because special applications are required to edit PDFs.

Although PDFs will generally display on mobile devices, they are less mobile-friendly than web pages. Some interactive PDF features (not to mention reduced readability at a “full screen size” of only 4 inches wide!) are not possible or intuitive on mobile devices. If content will primarily be displayed on mobile devices, a web page should strongly be considered over a PDF.

- PDFs must be accessible per section 508 of the federal code.
- PDFs must include a date/last updated date in the document itself.
- Links to PDFs must be labeled by file type. The newest build of the website does this for you automatically.
- PDFs should not be linked from graphic elements/buttons
- PDFs may only be linked to from main content Quadrants, not in

main navigation links, honeycomb, or connect bar as their functionality is maintained for linked webpages.

For information on how to create accessible PDFs from different file types, please **contact IRT for a consultation and resources**.

## Minimum Requirements

Like print materials, each web page must meet minimum standards. Yours must include:

1. A meaningful, descriptive Headline and Subhead that clearly announces the subject of the page.
2. Useful, informative and relevant text content. One page, one topic: Useful, informative and relevant focus.
3. Call to action: Each page should include a step that leads the reader closer to their goal.

## Important!

- The user defines relevance, not the writer. It is your job to answer: Where am I?

Why do I care? What can I see/do here? Where can I go/do next? for the user.

- Consider that words are often pulled away from its intended source format (the browser) into RSS feeds, email in-boxes, etc. The more consistently written and semantically-structured the style choices, the more related similar information will feel and accessible it will remain when viewed out of context.

## Best Practices (continued)

### Content Handling

**IMPORTANT!!** Paste all text from Word or another browser window as plain text by either first pasting into Notepad, or by using the dropdown in the upper left corner of the editor window.

**IMPORTANT!!** Content can and will be reviewed and fixed, removed or unpublished by Web Services. This may include:

- Remove redundant links to catalog, generic forms etc
- Old content not being given correct markup: remove spans, add paragraphs and button styling, improve tables with thead and tbody elements.
- Reformat lists of links for better usability via buttons and sidebars.
- Resizing images for clarity and performance
- All edits required to bring the site back to compliance with WCAG 2.1 Standards.

#### HTML is not for styling, but structure

- Never assume a paragraph is marked up as such (especially if it has been copy-pasted). This is most evident on T5 1-col layouts in which “non-`<p>`” paragraphs run the width of the window and often contain blue links.
- If several short lines of text belong together structurally (such as contact info and addresses), apply a ‘soft return’ at the end of each line to maintain a single paragraph with line breaks.
- Scan the content for long sentences with multiple clauses. Break them up by converting to a list.
- Use **b**, *i*, u and headlines as intended.
  - Do NOT ‘nest’ elements, ie., `<h3><strong><em>Word</em></strong></h3>`
  - **b**: (also `<strong>`) Use to highlight a key term in a longer line of text (ie., “Note:...”). DO NOT use bold to create your own subhead style.
  - *i*: (also `<em>`) Sparingly, for emphasis only, where you might have traditionally used underlines. Never entire paragraphs.
  - u: Not used in the new site. Convert underlined text to *i/em* italics to reduce confusion with underlined links.
- Content sections are there for a reason, they convey semantic meaning to each complete thought while providing the ‘landmarks’ the browser needs for maximum accessibility.
  - Do not skip the section header field.
  - Anchors can be added to links by converting “The Content Of The Subhead” into `#the-content-of-the-subhead`, but these are only available on section headings.

- Be mindful of additional white space at the beginning and end of content sections. Often these are leftover, empty space still formatted as a headline that will be incorrectly identified by assistive technologies.

## **Headlines & Subheads**

- Headlines and Subheads must follow a logical/numerical order. Only H2 and H3 are available in the new site. A section headline field always produces an headline 2 element. Only use h3 as needed within a section. If your content 'needs' an H4, it really needs to become its own section starting over with an h2.

## Best Practices (continued)

- Headlines, Subheads and Buttons automatically format in Titlecase. Replace the word 'and' with '&' whenever possible in all headlines and button labels
- You MUST use the provided headline field for each content block.
- For the banner subhead, add the university name (T2 and T3) or College/Division name eg., The College of Natural Sciences & Mathematics [at Sacramento State] or Faculty Research [in the Biological Sciences] (T4)

## Linking

- Never include the full URL as the link's label. Instead re-write it as a descriptive label and link from that.
- This also applies to email addresses. Link "Contact Dean Smith" rather than "Contact Dean Smith by email at deans@csus.edu" whenever possible.
- The WCM generates a text extension on links. You don't need to include (and should remove old instances of) " (PDF)" etc.
- The same link label on a page shouldn't be used to go to multiple locations, ie "read more" and "click here"

## Connect Bar

- **Date and Time:** Mon. - Fri. 8 a.m. - 5 p.m. not Monday, 8:00, am, etc.
- **Phone Numbers:** Use the (XXX) XXX-XXXX format.
- The **Meet Us block** should only link to the index page within your local Meet Us Folder.
- The **social media block** should link to your specific page, not the service's homepage or the university's page.

## Hexagonal "Hornet's Nest" Navigation

Use Campus-Wide/University-Wide/Department-Wide language for labels dependent on tier.

## Images

- No logos are to be used in embedded into banner, or as backgrounds behind sidebars. The T4 template Box 2 and Box 3 support an image/logo. Tables and charts should never be 'trapped' inside images unless absolutely necessary.
  - Upload image files to the most closely adjacent \_internal folder.
  - Images must include an alt attribute whenever the field is provided, or marked as decorative if the image does not add meaningful content people might miss. (A photo of students working is generally 'decorative.')
- This label must be descriptive

and meaningful, not the image's filename or 'image'.

- Images are most often the largest tax on website performance. Ensure your images load quickly by resizing images prior to uploading.
  - Banner images should be roughly 2000px x 1000px wide at 144ppi (~2.0MB).
  - Inset images in content areas should be sized to 1000px wide at 144ppi (~0.7MB).

**Note:** *The default size of images imported from the CSUS Flickr site are ~9MB. DO NOT upload these images to the WCM without first resizing them per the recommendations below.*

## Best Practices (continued)

### Buttons

**Labelling:** Button labels must always contain meaningful text related to where the user will be taken or which action will initiate on click.

[ Explore What Biology Has To Offer ] and [ Download The 2019 Roadmap For Chemistry Majors ] are well labeled buttons. Avoid vaguaries like [ Learn More ] and [ Click Here ].

### Tables

- Tables must use a <thead> and <tbody> section.
- Do not use bold in the <thead>, it is already applied to that style.
- DO NOT use paragraph tags inside of table cells.

### Hiding unnecessary elements

Your area may not need all the functionality provided. Only the first 2 content areas are mandatory. You may hide the Bottom Row, Hornetcombs and Connect areas using the Show/Hide radio buttons.

On T3 and T4 pages, empty quadrants can leave about an inch of vertical space. Choose the Hide toggle to remove those from the document.

# Design Guidelines

## Context & Scannability

The reader will rarely move through the website from the first word to the last. The reader is often scanning the page, deciding what to read and in what order. Consistent sizing of landmarks show the reader which parts go together. Affiliation indicates unambiguously what goes with what.

Shorter, more noticeable parts, such as headlines, can be read quickly, independent of any body copy. Too many small chunks of text can defeat the purpose.

## Hierarchy

**Things that go together should be closer to each other than they are to other things.**

Good typography creates subtle relationships. Draw a map of the content that guides them through it while reducing the ambiguity in the mind of the reader. Pay close attention

to *content relationships* as well as *formal relationships*.

- The space around letters, words, and content blocks at every level: paragraphs, lines, words, and letters.
- This rule applies also for disparate elements that work together, i.e. :
  - “A header should be closer to the paragraph it introduces than the one that comes before the header.”
  - “Two paragraphs of a single passage should be closer to each other than they are to the paragraphs that come before and after.”

**More important things should be more prominent.**

Headlines and buttons (not regular, underlined links) should be bigger than text in a paragraph, but creating hierarchy is not always that straightforward. There are often *several layers* of hierarchy in play on a single webpage.

Using more than size and space to indicate hierarchy is a good way to establish and reinforce the structure and identity of the website **but remember**: An element can also be made ‘bigger’ by changing its contrast — color, position or shape, and amount of space around an element can all play a role.

“How much more prominent” is also a concern:

- If elements are only slightly different, the ambiguity can be disorienting.
- If there is too much difference, the reader may skip over the less obvious items entirely.
- If an element is heavier in weight, it doesn't need to be bigger too.
- Larger-proportioned items need to stay consistent to and affiliated with each other.

# Messaging & Branding

It is critical for all areas of the site to use the University's official visual identifiers (logos and special marks), naming conventions, and style as outlined in the Sacramento State Brand Center.

## Grammar & Editorial Style

### Readability

The way you structure the writing directs the habits of the reader just as much as the website's framework does. The rhythm of how the writing is arranged and broken up is an essential part of a site's identity and overall accessibility. Online, we most commonly read by scanning in short bursts, so create an efficient reading experience using:

- short lines — aim for about 75 characters / 10 words. This is built into the 1-column T5 page template for you.
- bulleted lists and frequent subheads for the eye to jump between
- Break up chunks of text visually longer than 3-4 inches with extra returns. This practice is acceptable on the web as it aids readability.
- Use the oxford comma to reduce confusion.

### Abbreviations & Acronyms

- Do you write out unfamiliar abbreviations or acronyms on the first reference, and then use shortened versions? Acronyms – Avoid using acronyms unless they are very well-known: “ASI,” “MBA,” “ROTC.” If you must use an acronym (for instance, an organization with a very long title), use the full name followed by the acronym in parentheses. Then use the acronym on secondary references.

### Dates & Times

- The preferred sequence is time, day, date, place: “4 p.m. Saturday, June 19, in Lassen Hall.”
- Do not use a comma between the month and year if no day is included: “July 2012.” Hyphenate inclusive times and dates: “Workshop hours are 8 a.m.-5 p.m.”
- Do not use “on” before a date unless when it would cause confusion: “Registration

begins June 25, but the deadline is Saturday.”

- Do not use “st,” “th,” or “rd” with dates: “Christmas is Dec. 25, and school resumes Jan. 3.”
- The day of the week and date are used for upcoming events: “The festival begins Saturday, June 19.” For events in the past, only the date is used: “The festival began June 19.” Do not include the year unless the event is more than 12 months in the past or 12 months in the future.
- Refer to Connect Bar section of this guide for specifics in that area.

## Emojis

- Not for use on the web.

## Numbers

- Spell out numbers less than 10 except in headlines, where numbers can be used in all cases.

## Photography

Images that meet a high professional standard plays a critical role in creating a positive image of Sacramento State. Photos used on the website should inspire prospective students, faculty, staff and community members, make a connection with the people and activities depicted, and make alumni feel proud of their connection with Sacramento State. Use primarily documentary-style photography that captures authentic and vibrant interactions among students and among students and faculty. Obviously, it will be important to show

a range of genders, ethnic backgrounds, races, ages, etc., but try to avoid artificial-looking situations that are obviously trying to communicate diversity.

The Office of University Communications can provide guidance and/or assistance in securing high-quality photography. All photos should be compressed to a reasonable file size, usually under 2MB. IRT Web Services can provide assistance if necessary.

## Social Media & New Technologies

Sacramento State recognizes that the use of social media to exchange news and information is highly effective and popular. At Sacramento State, there is a growing network of social media sites, including an official Sacramento State Facebook page at [facebook.com/sacstate](https://facebook.com/sacstate), a Twitter feed at [twitter.com/sacstate](https://twitter.com/sacstate), a YouTube channel at [youtube.com/sacstatevideo](https://youtube.com/sacstatevideo), and an Instagram presence at [instagram.com/sacstate](https://instagram.com/sacstate). These platforms are linked globally in the footer of the site.

Each Department, Center & Organization at the Template 3 and 4 levels have access to a Connect bar which allows their own program's social media properties to be linked to.

It is important when launching a new social media site, follow the appropriate **social media best practices**.

## Third-Party Web & Mobile Applications

It is important to consult with IRT Web & Mobile Services prior to launching vendor-created websites or mobile applications. Implementation of such assets requires a review of technical considerations such as accessibility, effective system integration, authentication, and security, and

to ensure that they follow Sacramento State branding standards.

Requests to link or integrate content of this nature must be made to the Web Stewardship Team in advance of implementation.

Additionally, any website or mobile application that will be deployed for more than 50 users, must be vetted through the Information Communication Technology (ITC) Procurement process to ensure it meets accessibility requirements.

