AEM Authoring Basics Documentation

This is the print version of the AEM Authoring Basics Documentation. The web version can be viewed at [www.sfu.ca/cms/howto/basics.html](http://www.sfu.ca/cms/howto/basics.html).

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1. Basic Authoring

How does AEM work?

AEM is an online content management system. This means that authors do not need to install special software in order to use AEM, only a web browser.

Firefox is the only fully supported browser for using AEM. Other browsers may cause issues such as importing unwanted font styles, colors, or creating broken links.

In AEM, authors create, modify and delete content on an authoring environment (https://author.sfu.ca). Basic authoring activities in AEM such as adding text, images, and basic layouts, do not require the knowledge of HTML.

Changes to content in AEM are not made visible to the public until authors activate the amended pages (i.e., publish the content). Authors can also deactivate (i.e., un-publish) content if necessary.
2. Setup and Login

System requirements

**Mozilla Firefox** is the vendor-recommended browser for authoring in AEM in both PC and Mac environments. **Do not use** Internet Explorer (IE) as it causes **serious problems** in the authoring environment. Other browsers are also not recommended. See **Known Issues** for a list of identified problems.

Logging in

To log into AEM, go to [https://author.sfu.ca](https://author.sfu.ca).

Enter your SFU Computing ID and Password, then click **OK**.

Once successfully logged in, you will be brought to the **AEM WCM**. The site hierarchy will appear on the left panel of the screen, shown with "page" icons under the folders.
3. AEM Interface Tour

AEM WCM

The AEM WCM is the first screen you will see after logging in.

WCM Left Panel

The left panel of the WCM represents the site hierarchy. Here, you will find a tree structure of the pages and other content that can be expanded or collapsed.

This structure is generated as you nest content pages. This is also how URLs are generated.

If it is your first time logging into the system, you will need to expand the "Simon Fraser University" page hierarchy to view your department’s space. If you do not see this, contact your Site Administrator.

You will only be able to see the page structure for spaces in which you are allowed to author.
WCM Right Panel

Once you click on a page from the site hierarchy that contains child pages (i.e., pages nested underneath), the child pages will appear on the **WCM right panel**.

You can tell that a page has child pages by the presence of a plus (+) or minus (-) sign beside its icon. In the right panel, you may select one or multiple pages on which you would like to perform actions, including moving, deleting, copying, activating or deactivating.

A double-click on the page name expands the tree and opens the page at the same time.

AEM Modules

Listed near the top of the WCM are icons for the various modules in AEM: WCM, DAM (Digital Asset Manager), Community, Inbox, and Tagging. The arrow indicates that you are currently in the WCM.

Authors will normally use the first two of the modules: The WCM and DAM (Digital Asset Manager). The DAM is where you will store any other files you wish to publish on your website that is not a web page, e.g., PDFs and images.

Digital Asset Manager (DAM)

The DAM is where authors can **upload digital assets (or files)** for **publishing on their AEM webpages**. A digital asset is a digital document, image, video, or audio file, e.g. a PDF document.

The DAM’s interface is similar to the WCM.
As AEM is a web content management system, all digital assets must be uploaded to the DAM before they can be used on a AEM webpage.

Digital assets must also be activated (the same way as activating a content page) in order for them to appear on the AEM published page. Otherwise they will only appear in the author's editing window.

See Uploading Images and Other Files for more information on how to build content in the DAM.

Accessing the DAM

The DAM is accessed by clicking the camera icon at the top of the page.

An up arrow will appear under the camera icon and the tab title at the top left of the DAM left panel will read Digital Assets indicating that you have left the WCM and are now in the DAM.

DAM Left Panel

The folder structure is on the left panel, and can be expanded or collapsed by clicking the appropriate plus (+) or minus (-) symbols. For your first time using the DAM, you will need to navigate to your department's Digital Assets through the tree, beginning with SFU.

Contact your Site Administrator if you cannot see your department's Digital Assets space. You can only see those that you have been authorized to.
The right panel will display the folders and their contents, including thumbnails of images. A double-click on the image will display a larger version and details such as its size, description, tags, and dimensions.

While determining the folder structure of the contents within the DAM is entirely to the authors’ discretion, keeping it similar to the site structure in the WCM is suggested. This will offer a visual reference between the relationship of the files in the DAM and the pages in the WCM.

**AEM Editing Window**

**Double click on any of the pages** in either the left or right panel of the WCM to open the Editing Window, which will launch in a new browser window or tab. The Editing Window is where you will edit the contents of your page.

**Tip:** To launch the WCM from the Editing Window, click on the Websites button located at the bottom of the Sidekick (just to the left of Refresh, it looks like a globe).

**Sidekick**

To the right of the Editing Window, you will see the Sidekick. This menu contains the components you may use on the page, plus other properties including versioning and page activation.

It can be minimized or expanded by clicking on the little arrow in the top right-hand corner. You can also click and drag the Sidekick around when you need to.

The five tabs in the Sidekick are Components, Page, Information, Versioning, and Workflow.
The first tab is **Components**. These are the elements of a page that you must place to **tell AEM what type of content to expect**, such as text, images, calendars, column structures, forms, and others.

The **Page** tab allows you to view and change **page properties**; move, copy, delete, lock, or activate the page. It can also create a child page.

The **Information** tab lets you view the **log of changes** made to the page. **Author access permissions**, however, are controlled by Maillist, outside of AEM.

**Versioning** allows you to make a 'snapshot' of the page as it is, leave a comment on that version, make more changes to the page and compare, or restore (using Timewarp) an old version of the page. It is important to **version early and often**! Else, if you delete pages of your site by accident you will not be able to restore them.

The **Workflow** tab is used to start the process of activation, deactivation, publication, subscriptions, etc. when a page needs to go through approvals by different people to be changed.
In the bottom right hand corner of Sidekick, shown above, there are 4 buttons.

**Edit** mode is used to change the layouts or content of a page.

**Preview** mode shows you what the published version would look like.

The **Websites** button loads the WCM in another tab, and the **Refresh** button shows you the page with edits in place.

**Content Finder**

In the left panel of the Editing Window, you will see the **Content Finder**. This menu allows you to locate files (such as images and PDFs) from the Digital Asset Manager (DAM), as well as other pages and pieces of content within existing pages in AEM.
Searching in the Content Finder

To conduct a search in the content finder, authors must type in the name of an image, document, or page. The following search tabs are available:

**Images** - This tab allows you to search for images in the DAM, such as .jpg, .png, and .gif files, etc.

**Documents** - This tab is for locating files in formats such as .pdf, .doc, .ppt and even design files such as .ai (Adobe Illustrator). Search results will include documents whose content contains the search term/s.

**Pages** - This tab shows existing pages that you are authorised to view. You can drag and drop these into a hyperlink field to link to them automatically.

**Paragraphs** - This tab will let you search for paragraphs on other pages so that you can drag and drop them into the page you are editing to instantly create a reference. To find and reference a paragraph from another page, enter its author URL (which begins with "/content/sfu/..") in the search bar.

**Browse** - This tab lets you browse through your site’s tree to look for content, as opposed to searching. Both the WCM and DAM are accessible from the Browse tab.

You can **Refresh** the content finder with the little button just below the search field. To the left are the buttons to switch between Mosaic View and List View.
4. Uploading Images and Other Files

**Warning:** Any digital assets, such as PDFs, that must be restricted should **NOT** be uploaded to the DAM. The DAM is a public resource, and any files uploaded to the DAM will be viewable/accessible to the public. To protect files from public view/access, visit the [Restricting a Downloadable File page](#).

**DAM File Formats**

The AEM recommended DAM (Digital Asset Manager) file formats are:

- images: `.jpeg`, `.png`, and `.gif` (do **NOT** use .tiff); and

**Accessing the DAM**

Click on the "camera" icon at the top of the WCM window to access the DAM.

The DAM's interface is similar to the WCM; the folder structure on the left, and more information on items within the folders is displayed on the right panel.

The **design of the DAM folder structure for your website is at your group's discretion.** In many cases, authors will find that the DAM folder structure will end up to be similar to the site structure in the WCM. This enables more of a visual reference of where digital assets belong or are used on the website.
Creating a New Folder in the DAM

To create a new folder in the DAM, **select an existing folder** under which the new folder should be created in the DAM left panel.

Click on the arrow beside "New..." to trigger the drop down menu. Click to select "New Folder..."
A prompt will appear. The **Name** of the folder is what will appear as part of the URL. For this reason, keeping it shorter and in all lower case letters is recommended.

The **Title** is an optional field. This is the folder label that will appear on the left side of the DAM. Click **Create** once you have finished.

The new folder will now appear on the left side of the DAM under the parent folder you had selected and on the right panel. 

If you would like to move this folder, drag and drop it into the new location within the left panel.
Changing Folder Properties in the DAM

To change the title of a file in the DAM:

1. Right click on the folder and select Properties

A prompt will appear with the current title.
2. Change the title accordingly, and click **OK**.

The change will be reflected on the left.
Uploading a File to the DAM

There are two methods for uploading files to the DAM:

- Browse, and
- Drag and drop.

To upload a file to a folder in the DAM, first select the folder in which you would like to place the file from the left panel of the DAM window.

Note: If your department is read-accessible to others in AEM, your files will be able to be seen and used by anyone else in AEM. Consider them public!

Additionally, if you need to restrict content to particular pages, upload via the Download Component to individual Restricted Viewing Pages.

Browse Upload Method

1. Click on the "New..." button.
2. A prompt will appear. Click "Browse..." and select one or more files to upload.

3. After selecting a file, it will appear in the Upload Assets prompt. Once you have finished, click **Upload**.

The progress of the upload will appear on the prompt, and will close once it has completed.
After uploading, AEM will take a moment to process the file for its properties. If you wish, you may click on the Refresh icon (two circling arrows) on the top left of the right panel to update its status.

Drag and Drop Upload Method

To upload files via drag and drop:

Select the DAM folder for file upload

1. In the left panel of the DAM, navigate to the DAM folder where you’ll be uploading the file.
2. Click on the folder to select it.
The folder's existing files will be displayed in the DAM right panel.

**Upload the file from your computer to the DAM folder**

1. Navigate to the file on your computer.

2. Click on the file to select it, drag it into the DAM right panel, then unclick.

Your file is now uploaded and ready to be added to your AEM pages.
Uploading Multiple Files

Multiple files can be uploaded to the DAM at the same time. Using the **Browse Upload method**, the shift key can select multiple files to be uploaded.

For the **Drag and Drop Upload method**, either the shift key or dragging the cursor action will select multiple files. Once all the desired files are selected, drag and drop them into the DAM.

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**Warning**: AEM may slow down if a large batch of files is uploaded to the DAM. For that reason, only upload a batch of 50 files maximum at a single time. If there are more than 50 files to upload, upload a batch and wait for it to finish uploading. Only after that should the next batch be uploaded.

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For more information on how to add images to AEM using the Image component, see Using the Image component.

### Linking a DAM File

After you've uploaded your image or document file to the DAM, add it to your AEM page as follows:

**For document files**:

1. Create a link in your AEM page.
2. Hyperlink the link to the document in the DAM.

**For image files**:

1. Drag & drop an Image component onto your page.
2. Hyperlink the image to the image in the DAM.

### Activating a DAM File

Digital assets or DAM files, like AEM pages, need to be **activated in order to be viewable by your website's visitors**.

To activate your DAM file:

1. Locate it in the DAM right panel.
2. Click to select it.
3. Click the **Activate button** on the top menu bar.

After clicking Activate, the left indicator box under the Published column will change to orange (activation pending) and then green (activation complete).

Once the **left indicator box changes to green**, your DAM file has been **activated**.
Deleting a DAM File

If you no longer require a file in the DAM, you may delete it. However, deleting a file from the DAM is only recommended if the file is causing confusion or issues. Once a file is deleted, it cannot be retrieved.

1. Select the file to be deleted in the right panel. Click the **Deactivate** button. A pop-up will appear asking for confirmation. Click **Yes** to proceed.

After clicking **Deactivate**, the indicator box under the **Published** column will change to orange (activation pending) and then red (deactivation complete). Sometimes the page needs to be refreshed to see the box change colour to red.

2. While keeping the file selected, click the **Delete** button.
A dialogue box will pop-up, asking for confirmation. Click **Yes** to delete the file. The file is now deleted.

![Deactivate Asset dialog box](image)

**Please Note:** A file, which is deleted but not deactivated can still be viewed on the live site by going directly to the file's URL.

**Searching for Files in the DAM**

The search tab allows the authors to look for files within the DAM internally. Click on the **search** tab located right beside the Digital Assets tab.

*Note: All fields are optional.*

![AEM Assets search tab](image)

Once in the search tab you can fill in a series of information to assist the system in finding your files.
The **Fulltext** box allows you to quickly search the DAM files using keywords.

The **Path** box allows you to narrow down the scope of the search, by specifying the file system location.

A prompt will appear after clicking the **arrow button**. Click the **plus symbol (+)** beside "sfu" and navigate until you locate the appropriate folder, select it, and then click **OK**. This enables you to restrict the search to the chosen folder and its contents.
The **Modified after / before** field allows one to search for files within a certain time frame. Click on the calendar button, to set the date.

A date picker will appear, allowing you to choose the date.
To be even more specific, you can enter a time followed by the date.

The second row allows you to enter the date and time of the modified before field.

To specify what type of file you are looking for you can click the respective check boxes.

Select the arrow button to further specify the file type.

After filling in the applicable fields for your search, click the Search button located at the bottom right corner.

Your results will appear to the right of the tab.
5. Creating a New Page

In the WCM, click on the page in the site hierarchy (left panel) under which the new page should exist.

Click "New" from the top of the WCM right panel.

A menu to create a new page should appear.
For **Title**, enter the text that will appear on the navigation of your website. This text will also appear on the top of the browser window. For these reasons, **keeping the Title text as short as possible is recommended**. You may also edit this text anytime after the page is created, by going to Page Properties through the Page tab in the Sidekick.

The **Name** field is for the actual file name of the page (e.g., about.html). Enter the Name **without the .html extension**. If you leave this field blank, it will take the text from the Title field with dashes in place of spaces. The name can be changed by choosing "Move" in the WCM and editing the "Rename to" field.

Select a template, then click **Create**. The **Template Gallery** has more information about each template, including examples.
The new page has now been created, and should appear on the WCM left and right panels. If you wish to change the order in which this page appears, simply click and drag to place it into the desired order (e.g., after 'About Us' and before 'Undergraduate Program').

If they do not immediately appear, click on the corresponding **Refresh** buttons (icon with two blue circling arrows) located at the top left corners of each panel.
6. Moving and Renaming a Page

The procedure to move or rename a page are both accessed through the **Move** option in the WCM toolbar.

Moving a Page

Highlight the page and then select **Move** from the toolbar.

The option box will appear and in the **Move** field, it will display the path of the page you've selected.
In the **to** field, click the search icon.

After clicking the search icon the **Select Path** box will appear. The current location (the parent page) of your page will already be highlighted.
Proceed to highlight the location where you want to move the page under. After highlighting the new location of your page, click OK.
Now the **to** field will display the new path you selected. Click **Move** to complete the moving process.
A prompt will ask if this is the right destination to move the page. Click Yes to complete the process or No to return to the move options.

Renaming a Page

Highlight the page and then select Move from the toolbar.

In the Rename to field enter the new page name. The page name is the file name and it is displayed as part of the URL. Click Move to complete the renaming process.

Note: Names cannot have spaces and special characters. Use dashes instead of spaces and refrain from using uppercase characters. It is recommended to have a short but meaningful name within the context of the entire URL.
When the prompt displays click **Yes** to complete the renaming process or click **No** to return to the move options.

**Note:** The prompt asks you to confirm that this destination is correct because renaming and moving are processed in the same manner.
7. Page Properties

Basic

In the WCM, right-click on a page and then click Properties... to open up the page properties dialogue.

Page Properties... can also be accessed via the button on the page tab of the sidekick in the Editing Window.

After accessing the page properties there are options for changing the Title, assigning Tags/Keywords, and adding a Thumbnail.
Note: It is possible to change the name (URL) of the page by selecting it in the WCM right panel and clicking the Move button. Go to renaming a page for more details.

Editing the Title

The title should reflect the content on the page. It is the text that will show if you use the Title component.

Note: Changing the title does not change the URL. To change the URL you must rename the page.

Open the page properties. In the Title text field, enter the title then click OK. The title of your page will change immediately.
Navigation Options

The way links are displayed in the navigation bar can also be changed. Click the arrow beside Navigation Options to access more options.

HIDE IN NAVIGATION

By checking this box, the page will no longer appear in the navigation bar.

LINE ABOVE IN NAVIGATION

By checking this box, a thicker line will appear above the page in the navigation bar. Use this option when you have many top-level pages in your site that should be grouped.
More Titles and Descriptions

Open the page properties. Click on the arrow beside More Titles and Descriptions to access more options.

Page Title

The Page Title field can override the Title that appears in the Title Component.

Note: To change the title at the top of the browser's window/tab, modify the Title field. Go to editing the title for more details.

Navigation Title

The Navigation Title field overrides the link title that appears in the navigation bar.

On/Off Time

Click on the arrow beside On/Off Time to tell AEM when to activate (publish) and deactivate a page in advance.
ON TIME

On Time schedules the date and time at which the published page will be activated. When published this page will be kept dormant until the specified time. Leave these fields empty for pages you want to publish immediately (the normal scenario).

OFF TIME

Off Time schedules date and time at which the published page will be deactivated.

Below is an image of the Published column in the WCM for a page that has a set on/off Time. Clock icons over the green and red squares indicate that the page has a scheduled publication/activation time.

Advanced

Click on the Advanced tab to access advanced page properties such as Google Analytics, Adding your own custom JavaScript or Cascading Style Sheet (to a single page), and Restricted Page Viewing.

Using the Redirect Field to Link to External Site in the Left Navigation

To link to an external site in your left navigation menu, first create a dummy page in the WCM with a Title and Name. This page has no content.

Once the dummy page has been created, go to the dummy Page Properties and find the Advanced tab.
In the **Redirect** field, type in the URL that the page will link to. Be sure to include **http://** or **https://** at the beginning, then click **OK**.

More options

**HIDE Breadcrumbs**

This option hides the breadcrumbs on the page. Breadcrumbs are located at the top of the page.
HIDE NAVIGATION

This option hides the navigation bar.

THIRD COLUMN

This option creates a third column on the right side of the page. By checking this button, the page becomes a Three Column Template page. For more information on the AEM templates, please visit the Template Gallery.

Google Analytics

Click on the arrow next to Google to enter your site's Google Analytics. For more information on Google Analytics, please visit how to Add Google Analytics.

Custom Stylesheets and Javascripts

Click on the arrow next to Custom Stylesheets and Javascripts to add your custom stylesheets and scripts. Note that these will only be applied to this single page. To add site-wide CSS or JS files, see Site Configuration.

Click on Add Item to upload your css/js file from the DAM.
Restricted Page Viewing

At the bottom of the Advanced Section is the Restricted Page Viewing section, where authors can set a page to be restricted to a subset of SFU Computing IDs. Contact your Site Admin before setting up Restricted Page Viewing.

Image

Click on the Image tab to add an image to the page. Add an image to be displayed elsewhere in your site using the Carousel or List components.
8. Editing a Page

Launching the Editing Window

In the WCM, **double-click** on the page you wish to edit. You may do this from either the left panel or the right panel.

The **Editing Window** for the page will launch in a new browser tab or window. This is where you will be adding and changing content on the page.

**Tip:** If you close the WCM and need to re-open it, you can click on the 'globe' button in the bottom right-hand corner of Sidekick labeled "Websites".
Adding Components

Before you can add the actual content to a page (e.g., text, images, etc.), components need to placed. Components can be seen as “content containers” that tell AEM the type of content to expect, and what properties and fields it should display for editing.

The list of available components is located on the first tab in the Sidekick menu. They are grouped under General, Columns, Form, Social and Other and are listed alphabetically.

To move a component, you can hover over a component and then click-and-drag on the light blue border surrounding it. Note, to move in this manner, you must drag on the border, not inside.

How to Add a Component

To add a component from the Sidekick, drag and drop it either above or below an area marked with "Drag components or assets here".

A green checkmark will appear, indicating that the component can be dropped in this area. If you drag the component to an area that cannot contain a component, a red circle with a line through it will appear.

You can also right-click on the "Drag components or assets here" field and choose "New..." to add a component.

Component Right-Click Menu Options:

- Edit, Annotate
There are the options for interacting with components in AEM's Right-Click Menu. To access this menu, hover **over a component** and use your mouse’s **right-click function** (CMD+Click for Mac users).

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Annotate</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Cut</strong></td>
<td><strong>Copy</strong></td>
<td><strong>Paste</strong></td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>New...</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Edit** pulls up the In-Component Editing window for the component.

**Annotate** allows you to leave post-it style notes for other authors on the page, and draw freehand shapes to draw attention to areas of the page you want to discuss or change the content of.

**Cut** deletes the component from its location and saves it to your AEM clipboard. Similarly, **Copy** saves the component in the clipboard but does not delete it. In another area of the page (or a different page if you navigate to it in the same browser tab through your AEM site), you can then use the **Paste** feature to insert the component. **Delete** removes the component without saving it to the clipboard.

Do not use your keyboard’s Delete or Backspace key because this will usually trigger a browser’s 'back' functionality.

**New** generates an "Insert New Component" menu, which looks like the Sidekick without the last 4 tabs.
Note: Any modifications you have made to a page in AEM Author will not appear on your live website until you have activated the page.

The next several sections will demonstrate how to use some of the more common components in AEM. You may also wish to refer to the list of components in AEM for additional examples.
9. Using the Text Component

To add a Text component, drag and drop it into an area marked with "Drag components or assets here".

A purple checkmark will appear, indicating that the component can be dropped in this area. If you drag the component to an area that cannot contain a component, a red circle with a line through it will appear.

After releasing your mouse button to drop the component into the area, a "paragraph" icon will appear, indicating that a Text component has been placed.
Text Component Editing Options

Two editing options are available for the Text component: **In-Component Editing** and **In-Place Editing**. Advantages for each of these editing options will be explained in the descriptions below.

**In-Component Editing**

Place your mouse pointer over the Text component, and a green border will appear.

With your mouse pointer still **within** the green border, **double-click** to launch the In-Component Editor. It will appear as a dialogue box within your page.
Located near the top of the In-Component Editor is a **Rich Text Editing toolbar**. Use this toolbar to format the text you wish to place on your page.

This is **not** a "what you see is what you get" or "WYSIWYG" editor - you must click OK to see what the text actually looks like. This is in accordance with SFU’s Common Look and Feel style that AEM sites use, defining the look of text and headers.

**Note:** To single space text, use the "Shift + Return" keys to move to the next line.
You can **create links to other AEM pages** by using the drag-and-drop feature of the Content Finder.

To do this, start by using the Pages tab of the Content Finder to search for the page you want. Next, open up your text field and **highlight the text you want to be a link, then click the link button**. Click and drag the page you want from the Content Finder into the Link To field, and drop it when it turns **purple**.

Note that if there are links in your text, and you need to break up the text component into smaller pieces, copy (right click, choose Copy) the entire text component and paste a copy of it, removing text content as needed from the two components. **If you copy just a portion of text within the text component, any links in the text will be changed and will not link correctly in the pasted version.**

![Creating links using drag-and-drop feature of Content Finder](image)

**ANCHOR TAGS**

Anchors are little markers in the In-Component editing of the Text component that can be **linked to from elsewhere on the page**. Authors can create a short list of headings at the top of a page that, when clicked on, make the page 'jump' to the section of the page that it is referring, or 'anchored', to.

The links at the top of this page are a good example; they do not leave this page, but they take the visitor to anchors at Text Component Editing Options, In-Component Editing, Bulleted and Numbered Lists, Source Edit (HTML), and In-Place Editing.

To create an anchor, first **place your text cursor** in the text where you would like the anchor to be. Then click on the **Anchor symbol**.
In the Anchor field, give that location one unique word or compound word (case-sensitive). Click OK.

A little yellow square with an anchor symbol should appear in the text, where your cursor was placed earlier. Clicking on this symbol will bring up the previous dialogue, allowing you to change the name of the anchor.
Elsewhere on your page where you need to link to that section, **write some text that you would like to link to that section.** Highlight that text, and click on the **link button.**

Type a **hash symbol,** also known as a **number sign (#),** immediately followed by the unique word given to that section. It will become a link that will go to that section when clicked on.
That text is now a clickable link that is *anchored* to the location on the page specified earlier.

**Creating a Link**

To create a link, highlight the text that you would like your readers to click on.
Click on the globe icon on the upper right hand corner of the rich text edit window.

**Note:** The "unlink" icon, the globe with the red "x", is located next to "link" icon.

If you would like to **link to an external address**:

**Copy and paste** the address into the “link to:” text field. Be sure to **include to "http://"** in front of the web address.

If you would like to **link to an internal page**:

**Click** on the magnify glass. The select the path window should now appear.
Click on "Simon Fraser University" to expand all pages. Browse to and select the desired page. Click Ok.

**Note:** If you would like to link to a document that you have uploaded to your DAM, click on the "dam" folder and navigate to and select the document.

The text is now successfully linked to the web address.
BULLETED AND NUMBERED LISTS

To create bulleted or numbered lists, open up your text field and then click on the bullet button.

- Your text field will immediately start to make bullets like this one.
- Push Enter to create a new bullet, or push it twice to end the list

Like this. To start a numbered list, click on the numbered list button right beside the bulleted list button.

1. And then start to type your list, creating new items by pushing enter.
2. Or ending the list by pushing it twice.

Below is a picture of the bulleted and numbered list buttons.

Source Edit (HTML)

If you wish to edit the HTML in the Text component, click on the very last option in the Rich Text Editing toolbar. This will toggle Source Edit.
Note: The Text component (in-component or source edit mode) is **not appropriate for handling complex HTML functionality** - it is only for displaying text, and in some cases, images or tables. If you wish to embed **External Web Applications** or other code, use the **HTML component** or the **External Feed Component** as necessary.

You may then edit any HTML tags in the Text component. If you wish to return to rich text editing, click on the Source Edit button in the toolbar again.

Note: AEM will strip out certain HTML tags in Source Edit. To ensure that all changes in HTML are preserved, use the **HTML component**.

Once you have finished editing, click **OK** on the bottom of the editor to save.

After clicking **OK**, your changes to the text will appear in the styles defined by your site's look and feel. Changes to individual components are automatically saved in AEM; there is no need to save the entire page.
Inserting a table

You can use the Text Component to insert tables into your text, and to edit existing tables. This is the preferred method of using tables in AEM.

To insert a table, click the **Table** button on the Text Component’s toolbar.

In the dialog box that appears, enter the values for your table, and click **OK**.
You can now enter text into the cells of your table, and use all of the text editing component options on your table. To edit the properties of your table, right-click it at any time.

**In-Place Editing**

In the current version of AEM, In-Place Editing is only available for the Text component.

You can use In-Place Editing to edit Text Components to edit text quickly and easily, without having to launch the editing window. This is ideal for quick edits to content.
To activate In-Place Editing, **click once** on the component to select it. A **dark green border** should appear, indicating that you have selected the component.

Click on the component again after a brief pause, and the border will turn **orange**. (Note: This is what is referred to as a "slow double click", as performing a normal double click will launch the In-Component Editor).

The Rich Text Editing toolbar will also appear near the top of the Editing Window.

You may then begin editing the text within the dark green border, and use the options in the Rich Text Editing toolbar.
Once you have finished editing your text, simply **click off of the Text component to save your changes**. The green border will disappear, indicating that In-Place Editing is no longer activated.

For more tips and examples of Text component usage, see the Text Component page located under the Components section of this site.
10. Using the Image Component

From the **Sidekick**, drag and drop the Image component onto your page.

 ![Image Component](image)

Search for the image you wish to add to your page in the **Content Finder**.

**Double-click** on the Image component to open the menu for adding images. You can also skip this step and drag the image directly from the Content Finder onto the component, without the need to double-click. This will also trigger the in-component editing.

 ![Drag and Drop Image](image)

**Drag and drop the image from the Content Finder** into the Image component.
**Note:** Uploading images from within the Image component is not recommended unless you wish to restrict viewer access. Files uploaded this way are only attached to the page, and cannot be found or reused using the Content Finder or the Digital Asset Manager.

**In-Component Editing Options**

After dropping the image into the component, you may use the editing options on the bottom to crop, or create an image map. You can remove or change the image by clicking Clear.

To map an image, click **Map**. Then select how you want to create the image map (rectangle, polygon, and so on) and specify where the different areas of the image should link to.

The image can be cropped by clicking the **Crop** button and adjusting the corners of the crop area. If you need to crop the image to a specific aspect ratio, such as 4:3, use one of the predefined options in the **Aspect ratio** drop-down. This drop-down is located within the **Image crop toolbar**, which appears when the Crop button is clicked. The predefined options are useful for ensuring a group of images have the same height and width.
Image crop toolbar with predefined aspect ratios.

The **Info** button (the exclamation point) tells you where the image is referenced from.

**Advanced Editing Tab**

The **Advanced** editing tab can be used to give the picture a **title** and **alt text** which adds information and accessibility. If the alt text is left blank, AEM references the text entered in the Title field and use it for alt text.

You can also use the Advanced editing tab to add a **link**, only to other pages in AEM. If you wish to display a caption with the image, type it in the **description** field.
The **size** option can be used to define a maximum width or height of an image. This feature is particularly useful if an image container is too large and the image is occupying too much space.

**Note:** Only enter either a width or height value to prevent the image from being stretched.

Other details and tweaks can be made using the **CSS class** field, which you can read more about in the Component Styles section.

If you are satisfied with the image as it is, click **OK**. The image has now been added to your page.
11. Using the 2 Column Component

In the Sidekick, click to expand the Columns component grouping.

Drag and drop the 2 Columns component onto your page.
The 2 Columns component now will appear on your page.

By default, the columns are each at 50% in width. To edit this, click on Edit and choose an option from the drop down menu. Click OK when you are finished.
To add other components and content into the columns, you may drag and drop existing components on your page to move them, or create new components within the columns.

Below is an example of Text components placed in each column. You can place as many components within the columns, but note that column components cannot be nested (i.e., you cannot place a column component within another column component).
For more tips and examples of 2 Column component usage, see the 2 Columns Component page located under the Components section of this site.
12. Using the Reference Component

Drag and drop the Reference component from the Sidekick onto your page.

Double click on the icon that appears on your page to edit it.

In the menu, click on the down arrow beside the field. A menu with a site structure will appear that will allow you to navigate to the content you wish to reference.
Locate and click to select the page that contains the content you wish to reference. You can expand the tree structure by clicking on the 'plus' icons beside the pages.

You will notice that once you select a page from the site structure, the available content appears on the right panel of the menu.
From the right panel of the menu, click to select the content you wish to reference. Click Select to confirm your selection, then OK in the Reference component menu.
Then click **OK** in the Reference component menu to save the change.
The content will now appear on your page. Any future modifications to the content in the original source will also be updated on this page.

Note that you cannot edit the actual content in a Reference component.

For more tips and examples of Reference component usage, see the Reference Component page located under the Components section of this site.
13. Undo / Redo

Using the Undo and Redo function

To **undo** any action simply hold `ctrl + z (on a pc)` and `cmd + z (on a mac)`.

To **redo** an action hold `ctrl + shift + z (on a pc)` and `cmd + shift + z (on a mac)`.

There are known issues associated with using right click to copy and paste: This will **break** undo/redo for the entire page. Thus the method recommended when copying and pasting is to use the **keyboard shortcuts** `ctrl + c (on a pc)` and `cmd + c (on a mac)`.

and `ctrl + v (on a pc)` and `cmd + v (on a mac)`.

To copy a section of text:

1. Select the item to be copied and then hold `ctrl + c (on a pc)` and `cmd + c (on a mac)`. 
2. Then select a position to paste the item and hold `ctrl + v (on a pc) and cmd + v (on a mac)`.

If the change is not as intended, hold `ctrl + z (on a pc) and cmd + z (on a mac)` to undo the change.

If you have mistakenly deleted something, or want to redo the changes, hold `ctrl + shift + z (on a pc) and cmd + shift + z (on a mac)`.

A purple box will appear around the object visually cueing the success of the redo function.
14. Versioning

Versioning saves a copy of the current page so that an author can view, and revert back to it in the future.

When to use Versioning

- Before and after making major changes to a page.
- After editing/adding all your content to a page.
- Leaving a page for the next day or longer to edit.

Versioning is useful for comparing old versions with the current page. Authors can also revert back to older versions if you prefer them over the current page.

**AEM will only keep 30 versions. Once there are more than 30 versions, the oldest ones will no longer be available.**

Automatic Versioning

Activated a page will automatically create a version of that page, but deactivating a page will not.

Creating a Version

1. Click the Versioning tab (clock icon).
2. If you would like to add a comment to accompany your version, add text into the Comment text field. Comments are useful for documenting changes, as well as future suggestions for yourself or other authors.
3. Click **Create Version**.
Restoring a Version

This process shows how to restore a page to a past version; **it does not create a version of the current page.** We suggest all authors create a version of the current page (if you haven’t already) before restoring the page to an older version. This will allow you to restore the page back to how it was, in case you want to.

Follow the steps below to refer or revert back to a past version.

1. Click **Restore version** and a list of versions will show up. Check the box beside the version you want to restore.
2. To make sure this version is the one you want, click **Diff** to see the differences between the version and the current page.
The browser window will display the version you are inspecting. Text and images that are not in the current page but in the version will be displayed with a red line crossing it out.

3. After previewing the version, click **Back** to look at other versions, or click **Restore** to revert the page to this version.
4. If you click **Restore**, a prompt will ask you to confirm your decision. Click **Yes** to finish the restore process or **No** to stop it.

**Using Timewarp**

Use **Timewarp** to see the state of the page over a span of days. This tool is offered in AEM but contains limited functionality.
15. Activating a Page

When you make modifications to your pages, you will need to **activate the page** in order for the changes to appear on your live website. There are several ways to activate a page in AEM.

Activating a Page Using the WCM

In the WCM left panel, **click to select the parent of the page(s) you wish to activate**. The child pages (i.e., pages nested under the parent page) will display on the right panel.

Next, **select one** (or shift + click to select more than one) page in the **right panel** for activation.

With the pages still selected, click **Activate** on the toolbar above.

The status indicated under the **Published** column will **change from grey (green, or red depending on the page’s original status) to orange**, indicating that activation is progress.
Click the **Refresh** button at the top left to update the status. Once the status changes to green, your page has been activated and the changes are now live.

Your page is now **activated**.

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**Activating a Page from the Editing Window**

Ensure that you are in the Editing Window of the page you wish to activate. In the **Sidekick**, click on the second tab (with the "page" icon).
Click **Activate Page**.
Once you page has been successfully activated, a prompt will appear briefly on the upper right corner of your page with the message "Page successfully activated".
Activating and Deactivating at a Later Date

Pages can be set to automatically activate or deactivate at a later date in the WCM. This is useful when creating a form that is scheduled to accept submissions within a specific time frame, such as for a workshop registration form. A single page can have both a scheduled activation and scheduled deactivation, which would result in a set time frame a page is live.

1. Activating a Page at a later date
2. Deactivating a Page at a later date
3. Checking Activation/Deactivation Status

1. Activating a Page at a later date

In the WCM, highlight the page. Click the toggle arrow beside Activate and then in the drop-down menu click Activate Later...
Click the calendar icon and in the drop-down calendar select the preferred date to activate the page.

Click the down arrow icon and in the drop-down select the preferred time to activate the page.

Click **OK** and the page will automatically activate at the chosen time.

**Note:** If you make a change to the page after scheduling an activation, the change will **not** appear on the live page when the scheduled activation occurs. Only changes before the **Activate Later...** button was clicked will show on the live page. If you wish to have the change appear when the scheduled activation occurs, setup another scheduled activation and set the time a little later than the first scheduled activation.
2. Deactivating a Page at a later date

In the WCM, highlight the page. Click the toggle beside **Deactivate** and the drop-down menu will appear, then click **Deactivate Later**...

In the **Deactivate Later** prompt select the preferred date and time. Click **OK** and the page will automatically deactivate at the chosen time.

3. Check Activation/Deactivation Status

In the WCM, check the **Status** column for the activation/deactivation tasks you have assigned to a page. In the example below, the scheduled activation and deactivation is visible by hovering over the status icon.