

Linking in RiSE

Presented by:

Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 & 2016 Authorized iMIS Solution Provider (AiSP) of the Year

Hosted by



Presenter:

Tipton Ramsay

Creative Director

Association Technology Solutions, LLC

Direct: (720) 945-7263

Email: tramsay@atsol.org



Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org

Laying the Groundwork: Quick Overview

Hyperlinks are used to:

- Connect documents :
`Link Text`
- Load images:
``
- Include scripts on a page:
`<script src="/path/to/script.js" />`

In each of these options, the "href" or "src" can be defined using either an absolute or relative path.

Understanding the difference between "absolute" and "relative" links is key to ensuring these links are doing what you want them to do now(staging) and in the future(post go-live).

They can also have an impact when viewing pages over HTTPS.

Laying the Groundwork: Absolute vs. Relative Paths

- ABSOLUTE links have the full URL to a page that includes the protocol, domain, directory path and name of the document or image.
 - `Link Text`
 - Used to link to another website
 - Needed when loading content from different domain.
 - On HTTPS, just drop the protocol and start with "///"
- RELATIVE links only provides the directory path relative to current position and name of the document or image.
 - `Link Text`
 - Used to link within a website
 - Ensures "portability" by allowing development in one place and move to another.
dev.mywebsite.org => www.mywebsite.org
 - Leading with a "/" says start at root of site. Without, says start from current location.

Laying the Groundwork: Context is Key

Example sitemap generated link:

www.mywebsite.org/web/about/web/about/background.aspx&hkey=123456

[www.mywebsite.org] [[/web/] [about/]] [web/about/background.aspx] [&hkey=123456]

Links generated out of the RiSE sitemap are parsed by the system and used to decide:

- What template to use
- What primary navigation item to mark active
- If it should load the page with sub-navigation
- What sub-navigation to load
- What breadcrumbs to display

If you were to just go to the actual path to a file, [\[/web/about/background.aspx\]](http://www.mywebsite.org/web/about/background.aspx) the same content will load, but without much of the context listed above.

Anatomy of a RiSE Link

Actual link path

www.mywebsite.org/web/about/web/about/background.aspx&hkey=123456

Relative Link Broken Down

[/web/] [about/] [web/about/background.aspx] [&hkey=123456]

Anatomy of a RiSE Link

Actual link path

www.mywebsite.org/web/about/web/about/background.aspx&hkey=123456

Relative Link Broken Down

[/web/] [about/] [web/about/background.aspx] [&hkey=123456]

Website/template

Anatomy of a RiSE Link

Actual link path

www.mywebsite.org/web/about/web/about/background.aspx&hkey=123456

Relative Link Broken Down

[/web/] [about/] [web/about/background.aspx] [&hkey=123456]

Website/template

Navigation item

Anatomy of a RiSE Link

Actual link path

www.mywebsite.org/web/about/web/about/background.aspx&hkey=123456

Relative Link Broken Down

[/web/] [about/] [web/about/background.aspx] [&hkey=123456]

Website/template

Navigation item

Path to page/file on server

Anatomy of a RiSE Link

Actual link path

www.mywebsite.org/web/about/web/about/background.aspx&hkey=123456

Relative Link Broken Down

[/web/] [about/] [web/about/background.aspx] [&hkey=123456]

Website/template

Navigation item

Path to page/file on server

Unique GUID

Anatomy of a RiSE Link

Actual link path

www.mywebsite.org/web/about/web/about/background.aspx&hkey=123456

Relative Link Broken Down

[/web/] [about/] [**web/about/background.aspx**] [&hkey=123456]

Website/template



Navigation item

Path to page/file on server

Unique GUID

Hyperlinking in RiSE

Several ways to create links in RiSE:

- Sitemap
- Copy/Paste into HTML
- Content Link Manager 
- Hyperlink Manager 
- Free-link
- Shortcuts
- Navigation Code

Lets look at each of these and discuss the pro's and con's.

Sitemap Links

SITEMAP LINKS

RiSE uses the “Manage Sitemaps” under “Site Builder” to manage the different navigation regions (Primary, Secondary, Auxiliary, Footer) of a given website.

- Creates parent child relationships to decide what secondary items to show when a given primary navigation is clicked.
- A sitemap generated links provides the system with everything it needs to know to render a page correctly and in context of where it lives in the larger information architecture(IA).
- Links created and configured from the Sitemap will automatically show/hide based on where it is located in the IA, configured options, and/or access settings.
- Only show in navigation areas, not in page content.

Linking in Content: Copy/Paste

So how do we create links in content? We have several options.

COPY/PASTE

First create and publish in the sitemap, click the new item in the navigation, copy that link, CONVERT TO RELATIVE, and paste into into hyperlink manager or html view, with or without hkey, in content designer.


NOTE: Do not only use the published location of the file or you will see the correct content, but not in the correct context. It will show context of previous page.

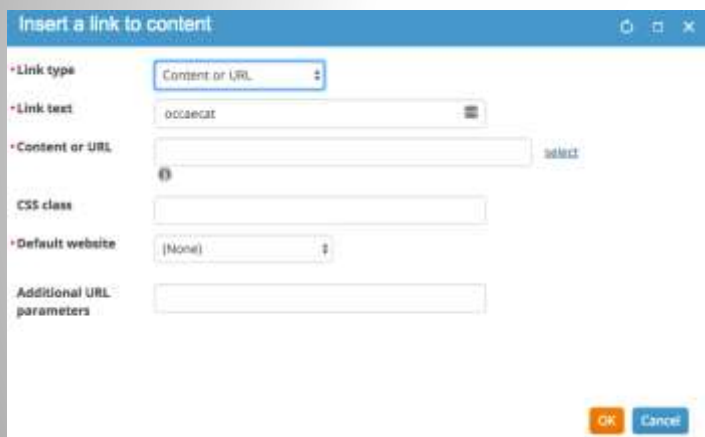
PROS/CONS

- Relatively easy to do
- Reliable results
- Requires you first create a sitemap item
- Possibly introduce absolute links
- “Dumb” and will not update if that page is moved.

Linking in Content: Content Link Manager

CONTENT LINK MANAGER

Select the text you want to link and click  icon in tool bar and navigate to content record.



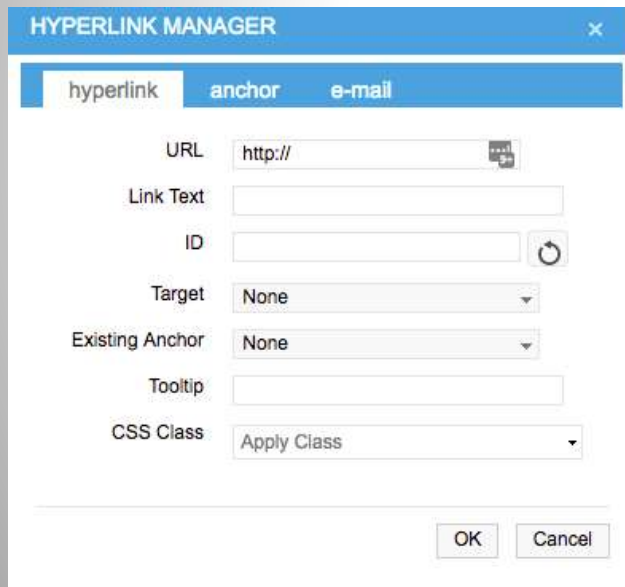
PROS/CONS

- Seems to be just what we want, **IT'S NOT!**
- It only provides a direct path to the published page, which I warned against earlier.
- Good for linking to downloadable documents, but not other pages in RiSE.
- The content will load, but without all the context.

Linking in Content: Hyperlink Manager

HYPERLINK MANAGER

Select the text you want to link and click  in tool bar and fill in fields.



The screenshot shows the 'HYPERLINK MANAGER' dialog box with the following fields and values:

- URL: http://
- Link Text: (empty)
- ID: (empty)
- Target: None
- Existing Anchor: None
- Tooltip: (empty)
- CSS Class: Apply Class

Buttons: OK, Cancel

PROS/CONS

- This is helpful with creating links that go to another website(absolute path) and open in new window(target).
- Fast and easy way to link up e-mail addresses.
- Can be used with Copy/Paste method described earlier, but **BE CAREFUL** not to introduce absolute paths.
- Need to know the link beforehand, so not helpful to link to other pages in RiSE.
- Drops context if using “publish path location”.

Linking in Content: FREELINK

FREELINK

At the top of each content record page, just below published file location, is the option to create a wiki style “Freelink” for use within a content html part. On render, the Freelink is evaluated and replaced by an actual hyperlink.

Publish location <http://interim.atsol.org/Demo/Default.aspx>

Click appropriate button to generate a full URL or free link to copy elsewhere.

[Generate Full URL](#) [Generate Freelink](#)

PROS/CONS

- This tool can be helpful to avoid all the steps involved with copy/paste, and the need to add a sitemap entry for every page.
- Can customize link text by formatting as `[[About | Learn more]]`
- Will automatically update if the page is moved.
- Can't add classes to anchor tag like “TextButton” to invoke styling.
- Can be un-reliable, and “break” if the destination page is republished.
- Find out more in ASI documentation.

Linking in Content: Shortcuts

Keyword search

Shortcuts

▲ For Website	Shortcut	URL or Content Record
All Sites	MemberHome	@/iSamples/Member/MemberHome
All Sites	MyAccount	@/iCore/Contacts/ContactLayouts/Acco...
All Sites	Organization	@/iCore/Contacts/OrganizationLayouts/...
All Sites	OrganizationAccount	@/iCore/Contacts/OrganizationLayouts/...
All Sites	OrganizationFullAcco...	@/iCore/Contacts/OrganizationLayouts/...
All Sites	OrganizationJoin	@/iCore/Membership/Organization_Join
All Sites	OrganizationJoinNow	@/iCore/Membership/General_product_...
All Sites	PrintBatchTransactio...	@/iCore/Commerce/Batches/Batch_Tran...
All Sites	PrintBatchTransactio...	@/iCore/Commerce/Batches/Batch_Tran...
All Sites	PrintBatchTransactio...	@/iCore/Commerce/Batches/Batch_Tran...
All Sites	PrintBatchTransactio...	@/iCore/Commerce/Batches/Batch_Tran...
All Sites	PrintProfile	@/iCore/Reporting_Services_Samples/M...

Linking in Content: Shortcuts

SHORTCUTS

Shortcuts are an easy way to create an alias's to a page in RiSE. This can be very helpful in avoiding having to use long sitemap generated urls in print collateral. It is also the mechanism that controls where many of the OTB features go like search, login etc...



The screenshot shows a form for creating a shortcut. It has the following fields and controls:

- For Websites:** A dropdown menu set to "All Sites".
- Shortcut:** A dropdown menu set to "ImisEvents".
- URL or Content Record:** A text input field containing the URL path "/-/ImisEvents/Conferences/ConferencesList" with a "select" link to its right.
- URL Parameters:** An empty text input field.
- Description:** An empty text input field.
- Buttons:** "Save" (orange) and "Cancel" (blue) buttons at the bottom left.

PROS/CONS

- Good for quick access to section landing pages
- Good for print friendly URL's
- Can still drop context for
- If you use the select to point at RiSE content page, it builds the URL the same as the Content Link Manager
- Can still be helpful though in catching permutations , acronyms and common misspellings.
 - Contact, Contact Us
 - Products, Products & Services

Linking in Content: Navigation Code

The screenshot displays the iMIS website builder interface. On the left is a dark blue sidebar with the iMIS logo and a list of site sections including Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, Site Builder, Manage sitemaps, Manage websites, Manage shortcuts, Page Builder, Tagging, Maintenance, Intelligent Query Architect, Business Object Designer, Process automation (PSM), Document system, and Workflow. The main content area shows a breadcrumb path: Member Responsive > - > About. The 'About' item is selected, and its configuration is shown in a right-hand pane. The configuration includes: Navigation link text (About), Navigation folder name (About), Tool tip description (empty), Content or URL to link to (@/Samples/MemberR/News/About), URL parameters (empty), Breadcrumb name (About), Hide on this page (unchecked), Override content title (empty), Navigation code (empty), and Image URL (empty). The interface also features a top navigation bar with options like Organize, New, Edit, Import, Export, Versions, Publish, and Preview, and a search bar at the top left.

Linking in Content: Navigation Code

NAVIGATION CODE

Each entry on the sitemap has the option to create a "Navigation Code" which acts like a shortcut, in that it allows for a intuitive and shorter alias, but does not drop context!

The screenshot shows a configuration interface for a navigation item. The left sidebar lists various site pages, with 'Membership' selected. The main panel displays the 'Properties' tab for this item. The 'Navigation code' field is highlighted with a red box, and a red arrow points to it from the right.

PROS/CONS

- Simple alias but keeps page context!
- Allows for intuitive naming of pages so staff can avoid the need to learn other techniques.
- Easy to create, and use. ``
- Requires a bit more strategy and planning to create unique naming to avoid duplication with OTB functions and Microsites.
- Takes some patience to get setup and to troubleshoot when not working.

PROTIPS

- Avoid issues by not using the same name as the content page. `About_Us.aspx | About_Us`
- No Spaces! Use `_` and Camel Case
- Create an use standard naming convention (prepend/append)

Tips and Best Practices

- Avoid absolute links wherever possible. This means actively making sure that the tool is not introducing them without you knowing.
- HTML View is your friend! Preview is NOT!
- Work smart, not hard by having a plan before you begin.
- Always test links as you create them to make sure context is not being dropped.
- Fail Forward! Create a safe place for you to experiment with these different methods and better understand their pros/cons.
- When in doubt, re-create
- **Don't** get overwhelmed... Reach out for help when necessary.

Questions & Answers



Presenter:

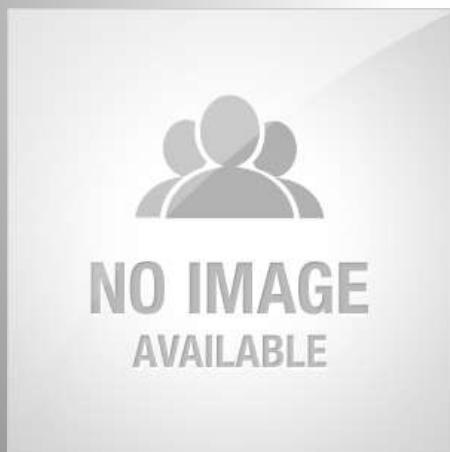
Tipton Ramsay

Creative Director

Association Technology Solutions, LLC

Direct: (720) 945-7263

Email: tramsay@atsol.org



Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org

More from ATS

Looking for more from the experts at ATS?

Upcoming Webinars

<http://atsol.org/Webinars>

schedule of upcoming webinars

Past Webinars

<http://atsol.org/PastWebinars>

*video recordings and
downloadable presentation slides*

Other Questions?

Email: info@atsol.org

Online: <http://www.atsol.org>

Phone: (720) 945-7252