

## Best Practice – Navigation for your website

### Navigating with purpose

Websites with good navigation provide thoughtfully created paths to help visitors find what they want. A site with good navigation considers both the goals of the website and its visitors. What are visitors looking for? What will keep their interest, and what will help them have a successful visit and want to return?

Good navigation tells the customer that you understand them and can help solve their problems. The first step to creating a site with good navigation begins by evaluating your visitors' goals. Will they be "browsers" who are attracted by compelling articles, images or media? Are your visitors technical and looking for very specific information? They may need product specifications, lists of features, pricing or delivery information.

Whatever type of visitor, you must satisfy their quest quickly with clear direction from thoughtful navigation and content that is relevant and well written.

### Create the journey one click at a time

Consider the navigation path your visitors will follow to achieve their goal. Evaluate and rework your site navigation plan until you are satisfied you have created the best path.

A technique called "card sorting" can help generate feedback to help create your navigation. Write the titles for main sections of your site on 3x5 cards. Ask others to sort the cards according to where they would expect to find certain information. Ask them to create labels for each pile of cards.

### Visitor care – trustworthy navigation

Keep your visitors' goals in mind. You will want to create links, menus and lists that produce their expected results.

It is also important to provide clues so visitors have plenty of information about what will happen if they click on one of your navigation devices. Provide clues with the <alt> text, by spelling out what the user will experience when they click on the link. Be creative, and be sure to provide what they were led to expect.

Once visitors find the information they need, be sure they have visual feedback to help orient them within your website. Tools often used to accomplish this include "Breadcrumbs," or links that change colors based on a "visited" state. Providing visitors a means to quickly return to familiar pages teaches them to have confidence and encourages them to visit other areas of your website.

### Visitors want direction – dynamic navigation

Visitors quickly scan a web page for text, images and links that are related to their quest. Successfully keeping the attention of your site visitors means always having relevant information in front of them.

It is also good practice to provide additional dynamic links to pages that are related to the key topic of the current page.

Consider the example of a Medical Internet Site. If the visitor is interested in procedures that are available for heart conditions and clicks on "Heart Treatments," they are probably not interested in the other topics that were first presented, such as "Kidney Diseases." It is good practice to eliminate the choices that clearly aren't relevant and show relevant choices.

Successful navigation focuses on the goals of visitors, the purposes of the site and provides dynamic feedback and positive reinforcement.

## Section 2 – The tools for building navigation that works

### List Summary

A ListSummary provides visitors with links that show a title and a brief summary of the content. The content must all be located in a folder (and sub-folders) in the CMS400.NET. List Summaries are dynamic and automatically generated by the CMS400.NET system. Using a List Summary helps visitors evaluate the link before clicking it and leaving their current page. Style sheets can be used to modify List Summary output.



### *When to use a List Summary*

- When providing a list of links with a title and a brief summary of contents stored in a CMS400.NET folder
- When lists should be automatically updated any time new content is added
- When lists should be sorted by most recent, alphabetically or by a specific author
- When displaying lists of forms, archived content, assets and library items, and multimedia files
- Examples: News Articles, Product Descriptions, Catalogs

## Metadata Lists

Metadata lists are filtered ListSummaries of content located anywhere in CMS400.NET. Metadata Lists are updated dynamically as content changes. Style sheets can be used to modify Metadata list output.



### When to use a Metadata List

- When providing links to related information based on metadata values
- When creating links to content found anywhere in the content structure
- When restricting content views by visitors or members
- Examples: Show list where metadata "condition=cancer"

## Collections as a navigation tool\*

Collections are deliberate lists of links for navigating to content in the CMS400.NET system. These links are for any content type, including: Quicklinks, images and documents. Collections are manually created by the CMS400.NET user. Collections can be unsorted lists and are often used for static menus or reference areas.



### When to use a Collection for navigation

- When a list of links requires infrequent changes
- When presenting an unordered list of links
- When linking to CMS-managed links but not to external addresses
- When restricting content view from visitors or members
- When associating links to various content types and locations within the CMS400.NET folders
- Examples: News articles with fixed order, menus, reference links, rotating images

\*Collections are a powerful tool within CMS400.NET that can be used for other purposes besides navigation. For example: random images displayed on pages.

## Search

Searches return relevant content and can move visitors directly to information they seek.



The Search control searches websites for HTML content (both active and archived), DMS assets (like Word documents and spreadsheets), forms and library items. A search can be restricted to types of content or folder locations by using "advanced search" features. Search results can also be formatted using XSLT.

### When to use Search

- Generally every site will benefit by using Search for managed content
- Where a restricted search should provide a limited list of choices
- When content exists that is not easily found with menus or links
- When seeking quick access to documents and files in the assets library
- Example: Search for archived content, Search only within a Subject, Keywords, Titles, Names

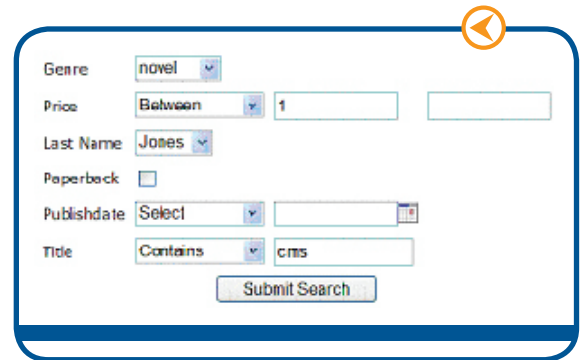
## IndexSearch

The IndexSearch feature locates XML content based on individual fields of information. IndexSearch is used to search data entered into Smart Forms.

Predefined searches can be created to appear on web form templates by using advanced features of the IndexSearch server control.

### When to use IndexSearch

- When searching XML structured data
- When searching data entered by Smart Forms
- When creating a "Developer-Defined" search
- Example: Catalog Categories, Authors, Events



## Programmatic Search

Programmatic Searches return content dynamically with a simple user interface according to coded instructions. Search "logic" can be used for conditions such as "AND," "OR," "GREATER THAN," etc.



Programmatic searches provide responses to a simple click action, such as pushing a button that says "E" and getting all content beginning with "E" Programmatic search expands the functionality of links by providing detailed and filtered results. Search results can be formatted using XSLT.

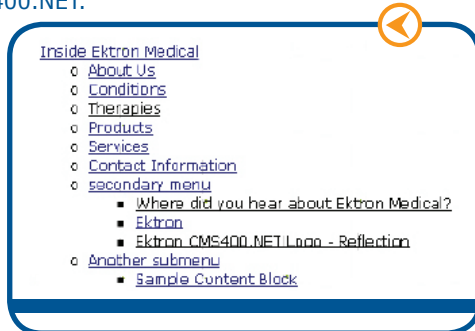
# Navigation for your website

## When to use Programmatic Search

- When controlling the search criteria
- When providing a simple search mechanism to dynamic content
- When keywords or phrases are not common to visitors searching the site

## Menu

Menus provide navigation to content, library assets, external hyperlinks and submenus. Menus are maintained in the Modules > Menu area of the CMS400.NET. Menu items can link to content, images, external addresses and Quicklinks within CMS400.NET.

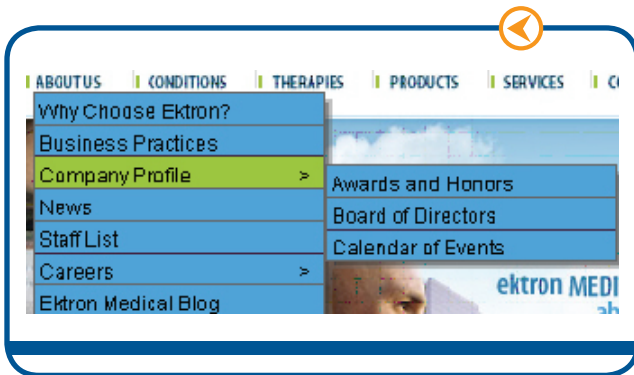


## When to use a Menu

- When DHTML Menu or SmartMenu functionality is not required
- When links to external addresses are needed
- When a tree view of all menu items is desired
- Example: Alternative Site Map, Intranets

## Menus – DHTML Style

DHTML Menus provide "drop down" animation in the menu control. This is managed in the CMS400.NET system by editors or administrators. Changes to the appearance of the menu are done by changing properties on the DHTMLMenu control and using the associated style sheet.



## SmartMenu

The SmartMenu is similar to a Menu or Collection control except that the current page is highlighted automatically as visitors navigate through the website using links or searches.

SmartMenu values are set in the CMS400.NET Workarea > Modules > Menu area. SmartMenu control properties and style sheets are used to change colors, fonts and other styles.

## When to use a SmartMenu

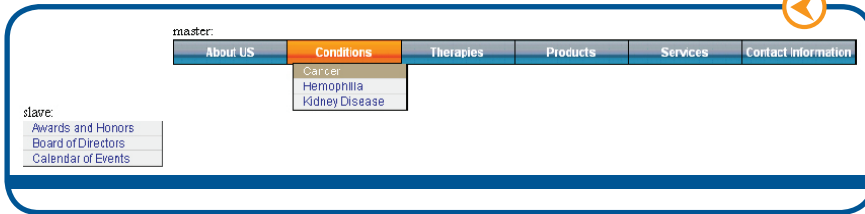
- When providing context-sensitive site navigation
- When showing users their present location within a website
- When showing content related to the current page
- When Section 508 compliance is required
- When launching a "new window" from a menu item



## FlexMenu

The FlexMenu (available in CMS400.NET Version 7.0) provides additional functionality to Menus and SmartMenus. The FlexMenu is able to create a master/slave menu relationship so that two menus (i.e., top and side menus) can be linked together. Additionally, the FlexMenu architecture makes it easy to signal to JavaScript and provides better design control with XSLT. Styles of FlexMenus include: Ajax-enabled, Expanding, Fly-out, Horizontal, List and Master/Slave.

FlexMenu values are set in the CMS400.NET Workarea > Modules > Menu area. FlexMenu styles can be altered by using XSLT and CSS. With Smart-Open enabled, the submenu can be highlighted according to its association with Content ID, links, folders and templates.



**When to use a FlexMenu**

- When providing context-sensitive site navigation
- When showing content related to the current page
- When Section 508 compliance is required
- When modifying the XML with XSLT
- When adding Ajax capability to your menus
- When using Master/Slave menus

**Site Map**

Site maps show what pages are available in the website and how it is structured. They provide quick access to pages at lower levels.

Site maps use the same value set in the Breadcrumbs tabs of the Workarea. Each folder level is shown relative to parent folders. The sitemap.css style sheet can be used to change the appearance of the site map.

**When to use a Site Map**

- When overall site content should be seen in one view
- When direct navigation to lower level pages can be made faster with a site map
- To show visitors the extensive amount of information available on a website



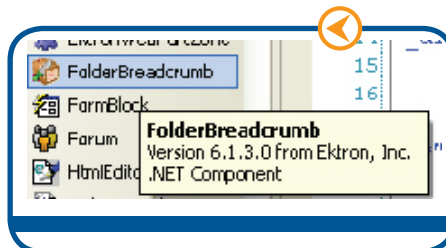
**Breadcrumbs**

The Breadcrumb tool shows visitors their current location inside a website and the path to follow to get back to the Home Page. It reflects the information architecture of the site.

The values used for Folder Breadcrumbs are set in the Workarea > Content > Folder Properties > Breadcrumbs area.

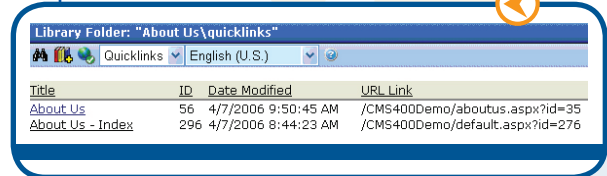
**When to use Breadcrumbs**

- When providing feedback to visitors regarding their location within the site
- When showing visitors an easy path to pages they have visited when moving down a folder path
- Example: "Home" > "About Us" > "News"



**QuickLinks**

All content is automatically given a Quicklink value that can be used for navigation in a website. By using Quicklinks, changes can be made to the content of a link while the Quicklink itself does not need to be changed.



**When to use Quicklinks**

- When creating hyperlinks to content items using the title of the content instead of the specific content IDs
- When you wish a content title to be associated to a template and content ID
- Example: "This month's newsletter" refers to quicklink .../CMS400Demo/news.aspx?id=10

**Taxonomy**

Taxonomy is a way to classify content items. By associating content with categories, this navigation tool gives visitors the ability to quickly find content related to their specific topic.

Use a CMS400.NET Directory control as shown below to present taxonomy for navigation.



**When to use Taxonomy and Categories**

- When dynamic navigation is desired
- When visitors need to find content based on categories
- When content can easily be categorized
- When you need to create easy site navigation without programming