OmniUpdate®
Empower Web Excellence

End-User Guide for OU Campus v10

Short Version

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About OmniUpdate, Inc.

OmniUpdate® is the leading web content management system (CMS) provider for higher education. The company focuses on providing an exceptional product and customer experience to its OU Campus™ CMS users who manage more than 700 web and mobile sites in the U.S. and around the world. OU Campus is secure and scalable, server and platform independent, and seamlessly integrates with other enterprise campus systems. It provides college and university web developers, administrators, and marketers with the user-friendly tools and deployment flexibility they need to achieve excellence. For more information, visit .

About This Guide

This is a shorter version of the End-User Guide for OU Campus v10.

OU Campus Support

The Support site is available to everyone and users are encouraged to visit and browse the site for information. An institution's administrators are also available if the answer cannot be found on the Support site or further explanation and clarification is needed. Administrators may contact the OmniUpdate Support Team. Ways to access the OU Campus support documentation include:

- Support site: http://support.omniupdate.com/
- The help link in the main interface of OU Campus
- The WYSIWYG Help link
- Help links embedded in the system
- Text instructions are provide onscreen for specific fields and functionality
- OmniUpdate Community Network (OCN): http://ocn.omniupdate.com/

Conventions

Shorthand for navigation through the OU Campus CMS is indicated with a greater-than sign and bolded: > For example, Setup > Sites. Code snippets use Courier New and a shaded background.

Contents

End-User Introduction

OU CampusTM provides users an easy way to manage web pages. With the ability to login directly from the institution's website, it is easy to navigate to the page to be edited. Once logged in, users can simply click on the area to edit, and they are placed in a user-friendly What-You-See-Is-What-You-Get (WYSIWYG) Editor.

The system allows an approval process to be put into place, which results in users either having the ability to publish pages once they have finished editing them, or they can send the completed pages to other users as defined by the workflow to gain approval prior to publication. The system has a built-in intelligence that allows the workflow process to be defined prior to page creation. Users do not have to understand which pages need approval prior to publication because the system tells them.

Pages are checked out to only one user at a time to prevent users from overwriting each other's work, but as the pages move through the workflow system, the system automatically changes to whom the page is checked out based on its placement in the workflow system. In addition, users can only access content to which they have permissions to edit. When creating new pages, preconfigured templates are made available to provide consistency in web page design. Users may also have the ability to upload new images, add words to the OU Campus dictionary, access full page source, and much more.

OU Campus Support

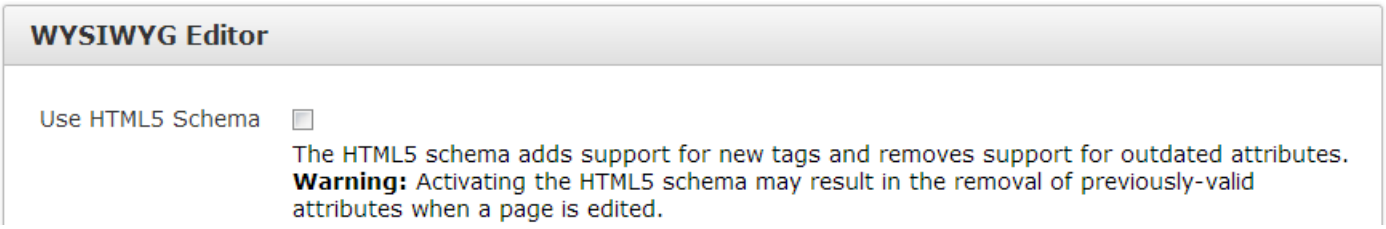
Online support is available through the OmniUpdate Support site at:

http://support.omniupdate.com/oucampus10/

The Support site, which is accessible by everyone in its entirety, includes user support on all the features in OU Campus, as well as video and text tutorials, archived Training Tuesdays, which are the free monthly webinars offered the last Tuesday of every month unless otherwise announced at 11:00 AM PST, and access to the Permissions Chart.

The Support site can be accessed through the Help link in the upper, right-hand corner of OU Campus. Additionally, support can be gained using the contextual help links found within OU Campus. Throughout the site the in-context help links are available and are specific to the area or task at hand. These links open the relevant page at the Support site.

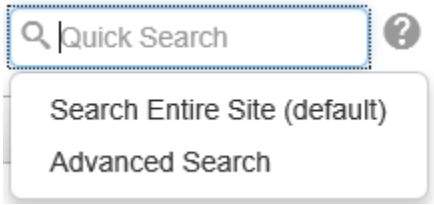
Finally, contextual help may also be found within the CMS as instructions relating to particular fields.



The Support site is available to everyone. Users are encouraged to visit and search the Support site. The institution's administrators are also available if the answer cannot be found on the Support site or further explanation and clarification is needed. Administrators may contact the OmniUpdate Support Team.

Filter and Quick Search

The Filter tool is available on the Pages list view and many views within the content management system. The Filter tool allows the content listed on the screen to be delimited by the string typed into the Filter field. The filter applies to specific columns that are available on the the screen and usually the filter does not apply to the date column.

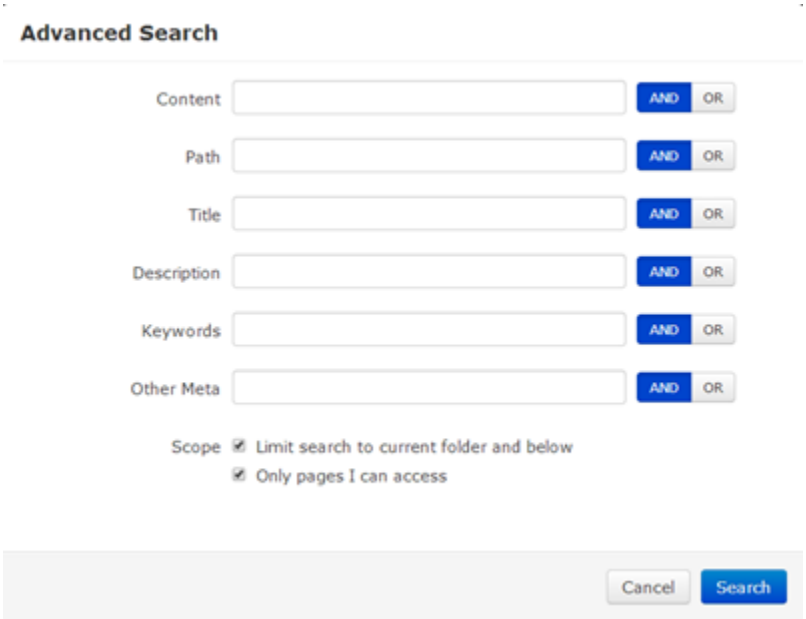


If the Quick Search functionality is turned on, it is possible to search the entire site for content. This search allows the user to find content in order to easily navigate to a desired page.

On the Pages list view the Quick Search is also the Filter tool. Content in the current view is filter; pressing Enter uses the Quick Search functionality to search the entire site.

Advanced Search allows for additional search criteria to be applied. The search can be narrowed by:

- Content (the search term)
- Path
- Title
- Description
- Keywords
- Other Meta
- Limited in scope to current folder and below
- Limited in scope to only pages to which the user has access



Keep in mind that the Quick Search does not search through code and it is not a find and replace function.

Log In

Overview

Content contributors and administrators alike can log in to OU Campus through a published page with the use of an on-page link known as DirectEdit™. DirectEdit can be a link, a button, an image, and more anywhere on a published page, as it can be styled to match the look and feel of the site. Typically, every page of a web site managed by OU Campus includes a DirectEdit link to allow content contributors to log in directly to edit a page.

After clicking the DirectEdit link, users are logged in directly to the **Edit** view of the page they logged into. Users must have the proper access privileges granted in order to access the page. Without proper access, users will be logged into OU Campus, but will be unable to view the page they logged into via DirectEdit.

The DirectEdit button type is configurable for the site by a Level 10 administrator. At the account level, the Login Page settings can be used to configure log in, log out, and authentication pages.

The layout that is viewed upon logging in to OU Campus depends upon the access settings for that particular editable region.

About DirectEdit

Users can access the OU Campus interface using DirectEdit by navigating to the page to be edited and clicking the DirectEdit link. DirectEdit links are determined by the template design. For example, the demo site, Gallena University, uses the Last Updated date found in the footer of the web pages as the DirectEdit link.\

Each implementation will be different, however. If a user is unsure as to what the DirectEdit link is for their site, they should contact a site administrator.

Clicking the link will take the user to the OU Campus login page. Once logged in, the browser session is persistent and a user can open another page in the same browser without having to log in again.

Editing a Page with DirectEdit

1. Click the **DirectEdit** link on the published page. If a user does not know what has been specified for their institution, they should contact their administrator.
2. Use the login credentials that have been provided for the user by the administrator. This might be a user name and password that is specific to OU Campus, or it may be that another authentication method is being used, such as LDAP, CAS, or Shibboleth.

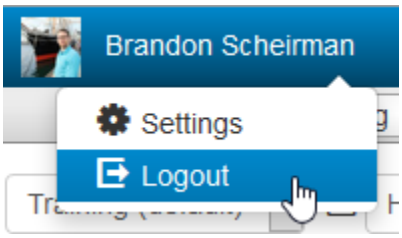
3. Select an editable region. For more information on editable regions, visit the Editable Regions page.
4. Edit the page.
5. Save and publish the page (or send to an approver).

Logging Out

Users can log out of OU Campus via the global navigation bar.

1. Hover over the user's name.

2. Choose **Logout** from the menu.



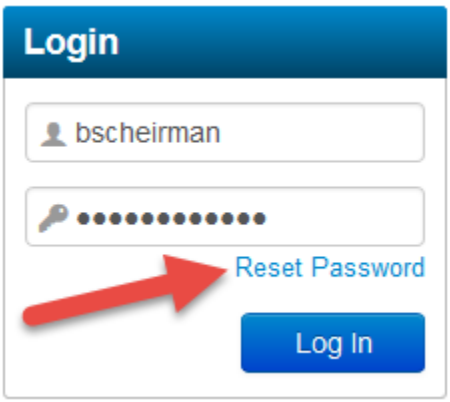
3. The original **Login** screen will be shown unless otherwise configured by an administrator.

Reset Password

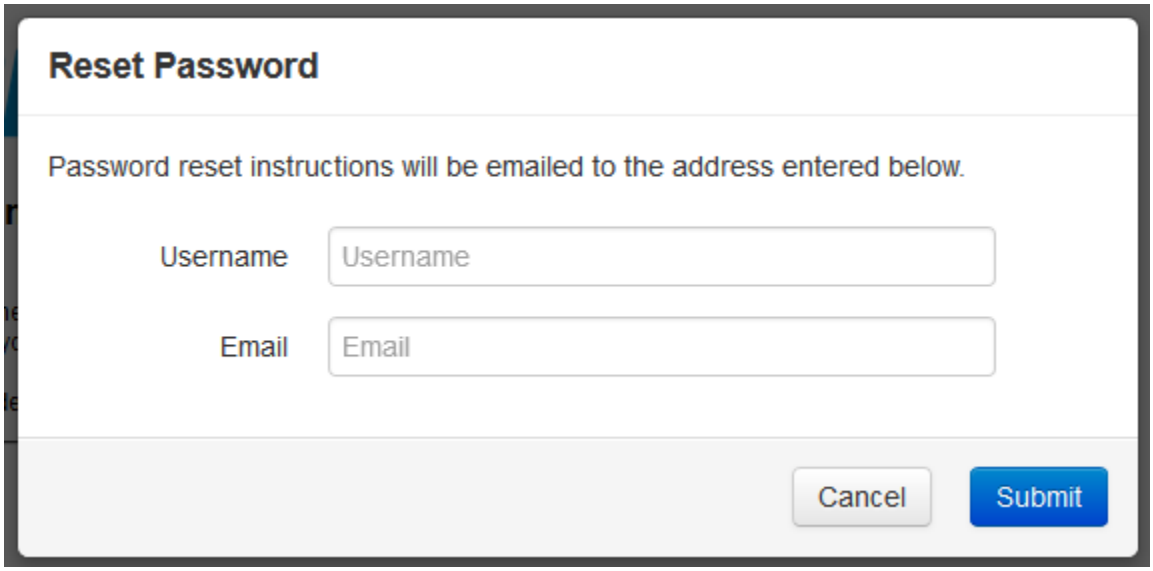
Content contributors and administrators alike can create a new password for their account. Reset Password allows users to change their password by entering their username and email address in a modal. After the information has been provided, an email is sent to the user, containing directions and a link that users can use to reset their password on their own without having to contact a system administrator.

Note: if a user's password is managed by an external authentication method, such as CAS or LDAP, the user will have to contact a system administrator for a password reset, as passwords are not stored within OU Campus in these cases.

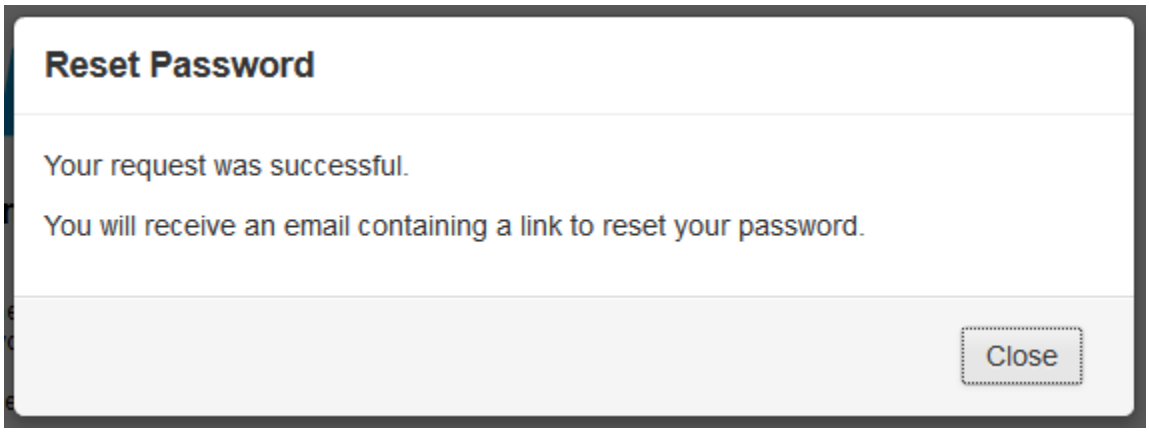
1. From the main **Login** screen, choose **Reset Password**.



2. A modal will appear, prompting the user to enter their username and email address associated with their username. Once both text fields have been entered, clicking **Submit** will send the email to the user's email inbox. If the operation needs to be cancelled, simply choose **Cancel**.



3. After a user has submitted their request, the system notifies them that it has sent an email to their inbox with instructions and a link to reset their password.



Failed Logins and User Lockouts

If a user incorrectly enters their login credentials more than three consecutive times, then they will automatically be locked out of the OU Campus system. This will prevent users from trying to log in again. In the event of a user lockout, the Reset Password function becomes unavailable. Instead, an administrator must be contacted to reset the user's privileges.

Editable Regions

Checked Out/In

Overview

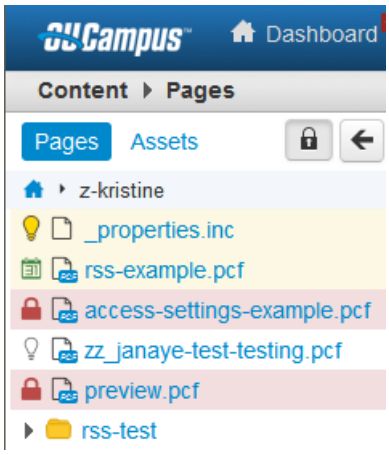
The checked out/in icon, represented by a lightbulb, reflects the state of an OU Campus page or file. When a user edits a page by clicking on an editable region button, or clicks to a from a list view, the page is automatically checked out to that user.
Likewise, when the user publishes a page it is automatically checked back in.

When a page or file is checked out to a user, no other users can enter the pages and make changes until the file has been checked back in. A level 10 administrator can override this and manually check pages back in that are checked out, and doing so will cancel any unsaved changes to the page.

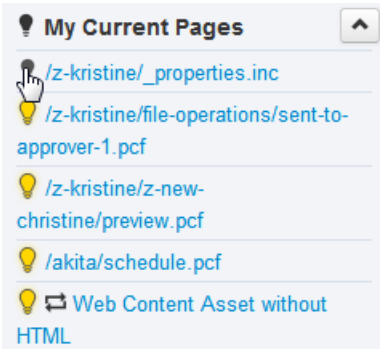
A user might also decide to check out a page in order to make other page options available. OU Campus also has status indicators help make clear why a page is not available for editing as well as who has checked out a page, scheduled an action, or if the page is in the process of a workflow. These icons are shown on many of the screens that display content lists, most notably the File Navigation sidebar, Pages list view and the My Checked-Out Content gadget.

For example, in the Pages list view (**Content > Pages**), the page status indicators are found in the Status column. A lit light bulb indicates a page is checked out to the currently logged in user and a red lock indicated the page is checked out to another user. An unlit light bulb indicates the file is checked in and available to be checked out.

Page Status Indicators in File Navigation Sidebar



Checked Out Pages in Gadgets Sidebar



Status Indicators

Icon	Description
	An unlit light bulb indicates that the page is checked in and can be checked out for editing by any user with the proper permissions.
	A lit light bulb indicates that the page is checked out to the current user (the individual currently logged into OU Campus).
	A red lock indicates that the page is checked out to another user. Users can hover over the lock to see who has checked out the page.
	A green calendar icon is the status indicator for a publish scheduled by the current user. Administrators or the individual who scheduled the page to be published can click on the icon to change the publish date and time or cancel the publish completely.
	A red calendar icon is the status indicator for a publish scheduled by another user. Administrators or the individual who scheduled the page to be published can click on the icon to change the publish date and time or cancel the publish completely.
	A red circle with a line through it is the status indicator for an expire scheduled by the current user or another user. A scheduled expire can be removed or rescheduled by the user who scheduled the expire. An administrator can check in the page, which effectively cancels the scheduled expiration. This icon is displayed to all users, not just the user who scheduled the expiration.

Checking In a Page

It is valuable to note that pages stay checked out to the user until the user:

- Sends the page to another user for review.
- Publishes the page.
- Checks the page back into the system by clicking on the lit (yellow) light bulb.

Behaviors of Checked Out Pages

If a page is checked out by another user, the current user may still perform the following actions; even though the page is locked:

- Edit access settings
- Edit reminders
- Preview the page
- View the log
- Copy the file

Available Actions for a Locked Page

Best Practices

- Make sure to check the page back in when finished editing the page so it can be made available to other users.
- OU Campus supports WebDAV and can be enabled by a Level 10 administrator. When WebDAV is enabled, OU Campus supports file locking with specific WebDAV clients that utilize file locking.

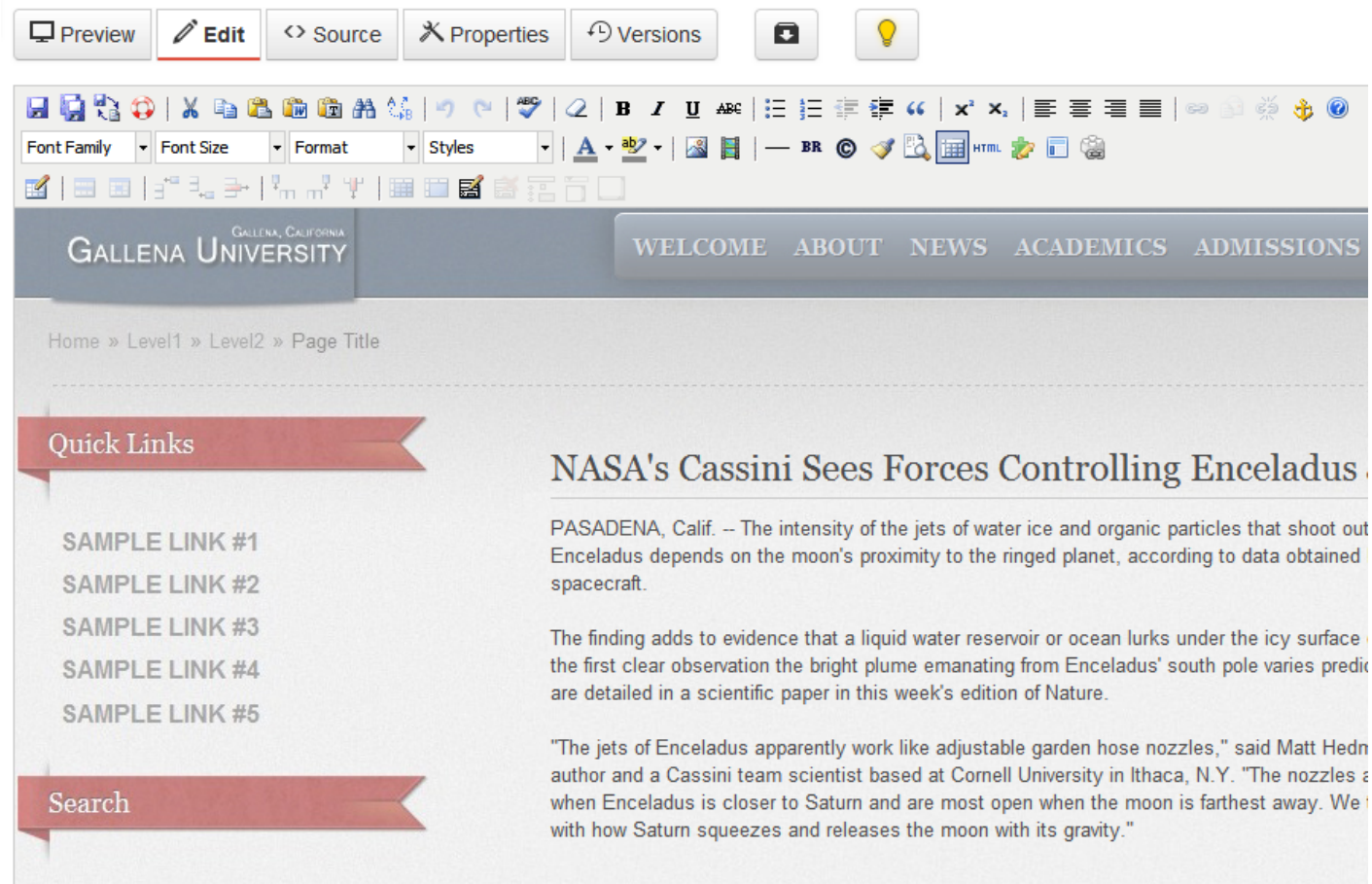
WYSIWYG Editor

WYSIWYG Editor Overview

There are several types of editors available to edit pages in distinctly different ways, but the WYSIWYG editor is the most common way for users to edit pages in OU Campus. The WYSIWYG (What You See Is What You Get) Editor allows for a familiar experience of editing a page similar to that of many web applications and traditional word processors.

When logging into the system to directly edit a page, there may be several editable regions available. The available editable regions are defined by permissions levels and group associations. Only areas that are available to be edited by that user are shown with an edit button. Clicking on the Edit button above a region allow for the area to be edited. This opens the WYSIWYG Editor by default and the assigned toolbar is available.

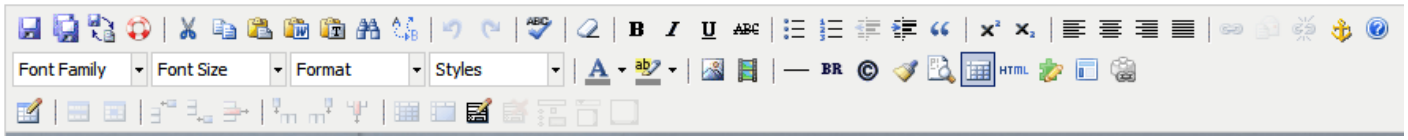
Keep in mind that part of the configuration of the template design may include an image in the background that helps present a more accurate rendering of how the content will appear on the page. It is intended for visualization purposes and to help understand how the content is organized on the page into editable regions. Once the content has been saved, an actual view of the configured page can be seen using the Preview mode.



When editing in the WYSIWYG, modifications should be saved by clicking the Save icon before navigating away from the page. If an attempt is made to navigate away from the page without first saving it, the user notification is shown as a reminder to save the page.

Toolbars and Tools

Many of the editing tasks for a page such as inserting images and links, applying formatting such as bold, and spell checking a page can be accomplished from within the WYSIWYG using the toolbar. WYSIWYG toolbars are customizable and the toolbar the user sees may contain a subset of the available tools as various custom toolbars can be created, which can be assigned to users, sites, directories, pages, and editable regions.



Icons represent the tools. Clicking on any icon performs an action, either directly to the page, or to the selected text and graphics. Some icons display more options in a drop-down menu, or in a dialog.

The availability of a function is based on the selected items, or the location of the cursor on the page. For example, if nothing is selected, functions such as Insert Link are dimmed, signifying that this function is not available at the moment. For the Insert Link function button to be available, the user must first select text or a graphic.

In many cases, right-clicking offers contextual functions. For example, right-clicking within a table provides a list of available table editing and formatting functions. Additionally, commonly used control key combinations are available such as CTRL+X, CTRL+C, and CTRL+V for cut, copy, and paste respectively for PC.

Toolbar Functionality

Each toolbar is organized into three rows and each row has groups of functionality. In the WYSIWYG, the groups are divided by a vertical line on-screen. The behavior of the icon is specific to the functionality of the tool. For example, some functionality such as the link tool requires text or another type of content to be selected before it is available on the toolbar. Other items on the toolbar include icons that are unavailable until the main feature has been inserted on a page. For example, the Insert/Edit Table icon will be available, but the other table editing tools such as those to define row properties or delete a column are not available until a table has been inserted on a page. Some items such as the Insert/Edit Image icon or spell check, when clicked, provide a dialog with a much more underlying functionality than is readily apparent. One last type of element that might be available on the toolbar are several drop-down selectors that provide the ability to style text.

One item that is not represented on the toolbar, but is available from within the WYSIWYG is the ability to save-in-place (CTRL+S or CMD-S). This offers users the ability to save the page without clicking the usual save icon that ends the editing session. Save-in-place saves the page and allows the user to continue editing.

Insert/Edit Link

Insert/Edit Link Overview

The Insert/Edit Link tool provides the basic functionality to add a hyperlink within the WYSIWYG Editor. Links are created by highlighting text or an image, clicking the Insert/Edit Link icon, and specifying the Link URL. The Insert/Edit Link icon is dimmed until the text or image to be hyperlinked is selected. A hyperlink can point to an internal web page, an external web page not maintained in OU Campus, as well as a directory or file within OU Campus or external to it. This can include linking to binaries, such as PDFs. Links can be made among sites within an account. In addition to providing the basic functionality for creating and maintaining links, this tools provides more advanced functionality relating to linking including linking to anchors, specifying targets, applying classes, and utilizing JavaScript and HTML to affect the style and behavior of a link. Several tutorials are included on this page:

- Inserting an Internal Link (Typical)
- Linking to an Unpublished File
- Linking Across Sites within an Account
- Inserting a Link to an External Site
- Specifying a Target

Links and Dependency Manager

It is possible for links to pages or directories maintained within OU Campus to be updated automatically when the page or directory to where the link is pointed is moved or renamed. The links are tracked by Dependency Manager. When Dependency Manager is activated, it is important to browse for the appropriate page in order to ensure that the link will be updated if the target page, directory, or other content is moved or renamed. Pages can also be linked to internally without browsing and inserting a dependency tag, and can also be specified with a root-relative syntax.

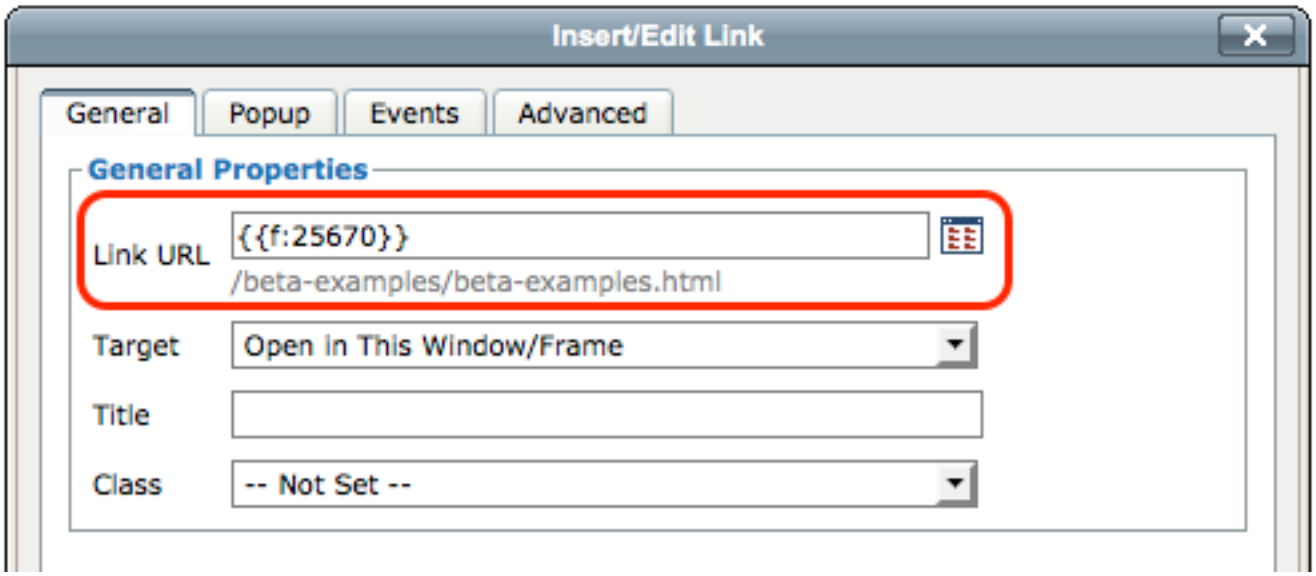
Dependency Manager can be configured to manage links both within a site and across sites within an OU Campus account. However, it does not manage links to external websites such as CNN. If Binary Management is in use for the site or sites, binary files such as PDFs and images are also managed.

Links with dependency tags may also be inserted with the Source Editor and file choosers and are supported across publish targets if Multi-Target Publish is configured. Once the appropriate page is selected, a dependency tag is shown instead of the page path. The actual path to which the link will be pointed is shown below the dependency tag.

Example syntax for the tags are shown as follows:

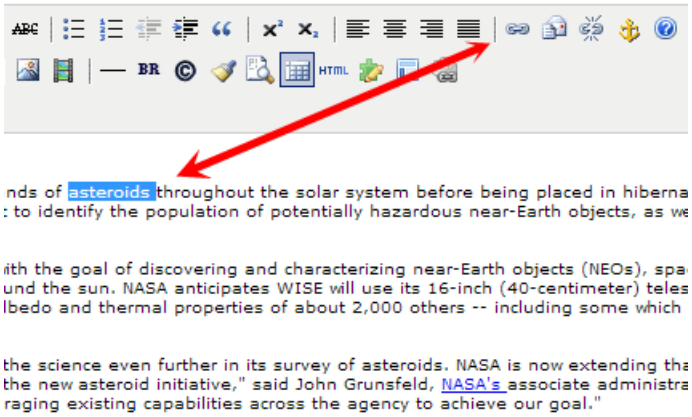
- {{d:####}} — Directory tag
- {{f:####}} — File/Page tag
- {{a:####}} — Asset tag
- {{s:####}} — S-tag

Example of a Dependency Tag

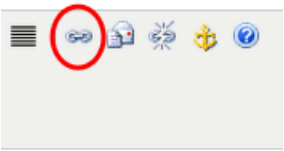


Inserting an Internal Link (Typical)

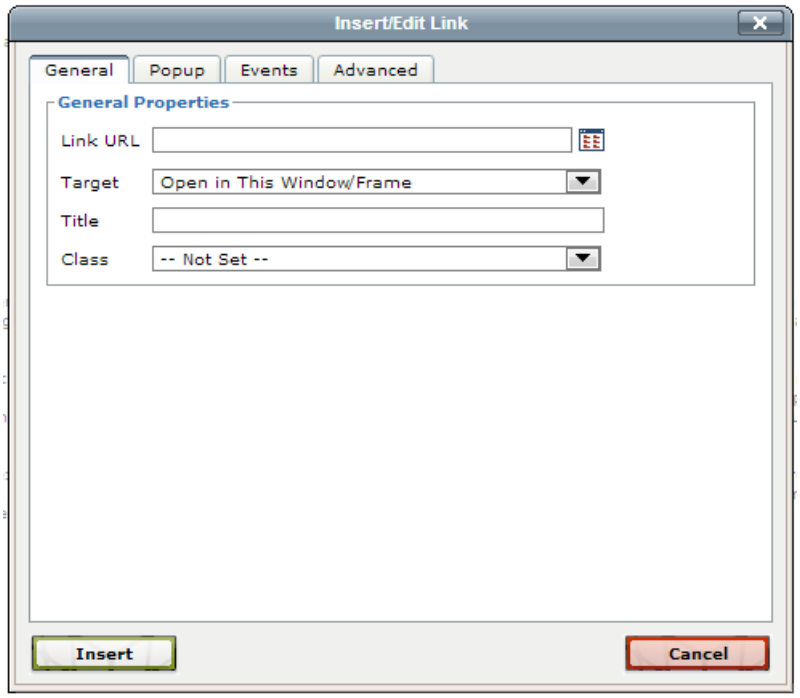
1. Within the **WYSIWYG Editor**, select the text or image for the link.



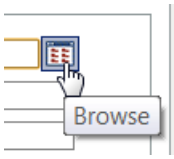
2. From the toolbar, click the **Insert/Edit Link** tool.



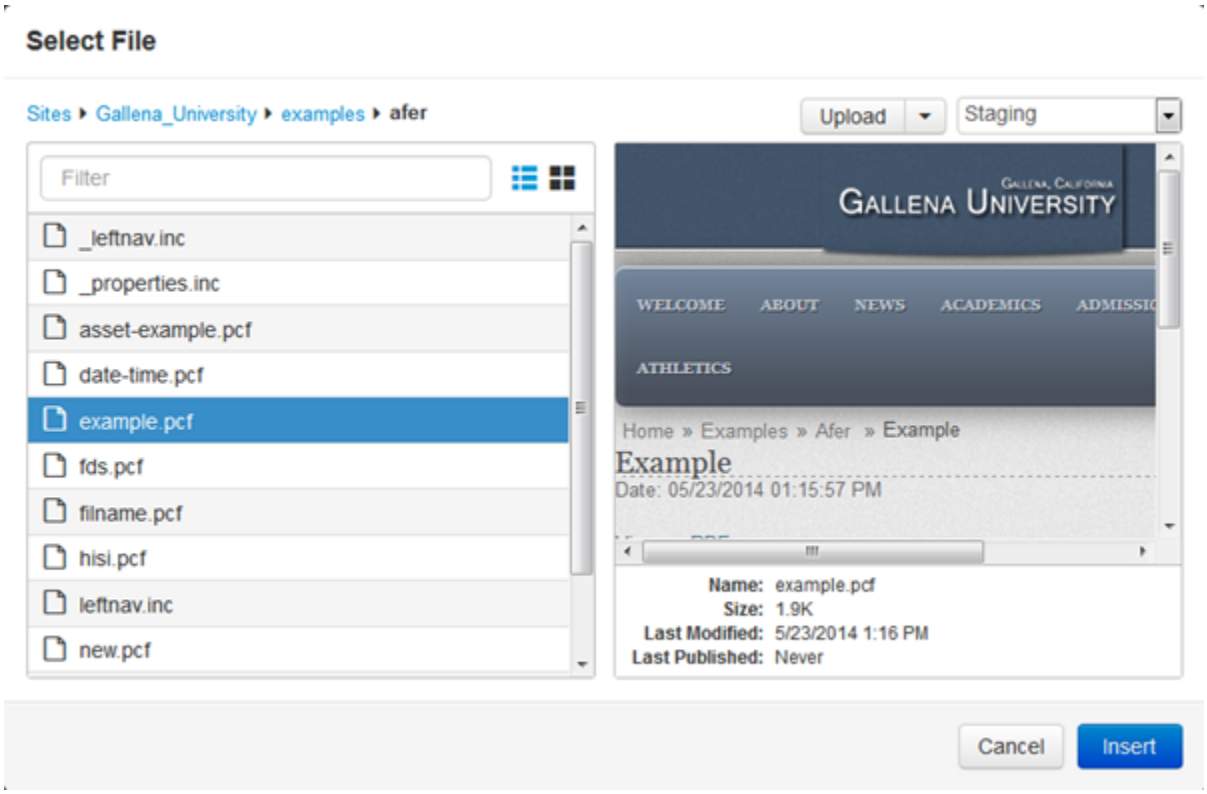
The **Insert/Edit Link dialog > General tab** is shown. If applicable, the dialog contains existing link information.



3. Click the **Browse** icon to select an internal page to which to link.



The **Select File** modal is shown.



4. Select a file or directory to which to link. The staging server is selected by default and a PCF file type should be selected in order to have links managed. Navigation can be accomplished by:

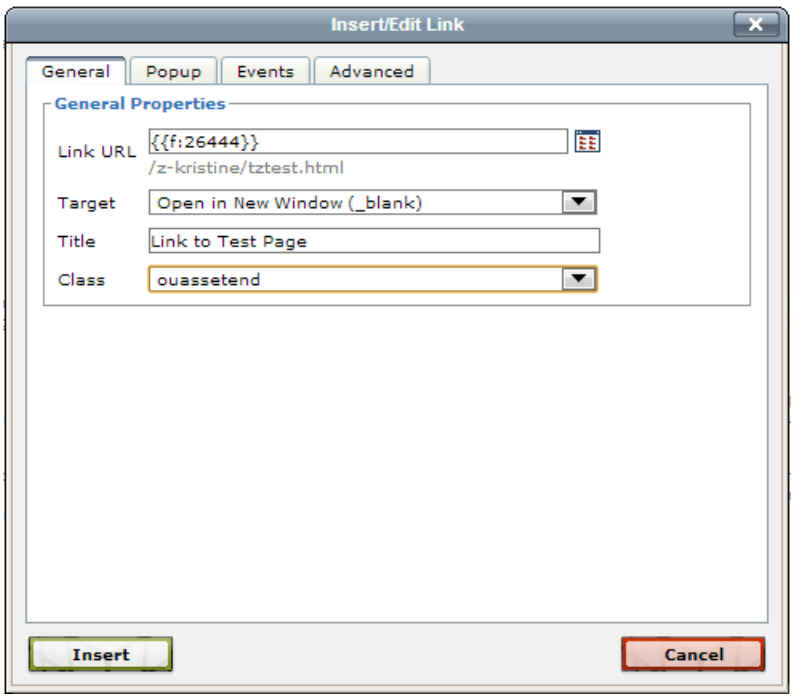
- Clicking the breadcrumb link to navigate up the folder structure
- Filtering by enter the first few characters of a subfolder or file name.
- Uploading a file and linking to it (Click the **Upload** button)
- Selecting a different environment or auxiliary site.

Generally, for internal linking just select the PCF, click **Insert**, and see the next step.

4. From the **Select Product** dialog, the HTML output is usually the default and highlighted, so click **Insert Link**.

5. In the **Title** field, it is frequently a best practice to add a short descriptive phrase.

6. From the **Insert/Edit Link** dialog, click **Insert**.



Other configuration options for a link are also available before inserting the link; for example, selecting a **Target** window/tab for the link to open in.

The **Title** is both valuable and important as this is used by screen readers and helps keep the site in compliance with accessibility compliance standards. The text entered in this field is used to create the title attribute for the <a> element in HTML. A developer might use this attribute to display the text when mousing over the link. Here's what it looks like in HTML:

<a **title="Contact Us"** href="{{f:####}}">test

Linking to an External Page

The steps are the same as the procedure outlined in the Inserting an Internal Link (Typical) heading, but rather than browsing for the internal link the complete URL for the resource can be typed (or pasted) into the URL field. Links to external pages are not under Dependency Manager tracking. The protocol prefix is required; i.e., http:// or https://

Linking to an Unpublished File

An unpublished file on the staging server or publish target can also be linked to prior to actually publishing the page. The steps are the same as the procedure outlined in the Inserting an Internal Link (Typical) heading up to and including linking to the HTML product. Note that the important difference is that when publishing the file, there will be an Include Unpublished Dependencies checkbox and by default it will be selected. This ensures that the unpublished file that was linked to is also published and proper link management is maintained.

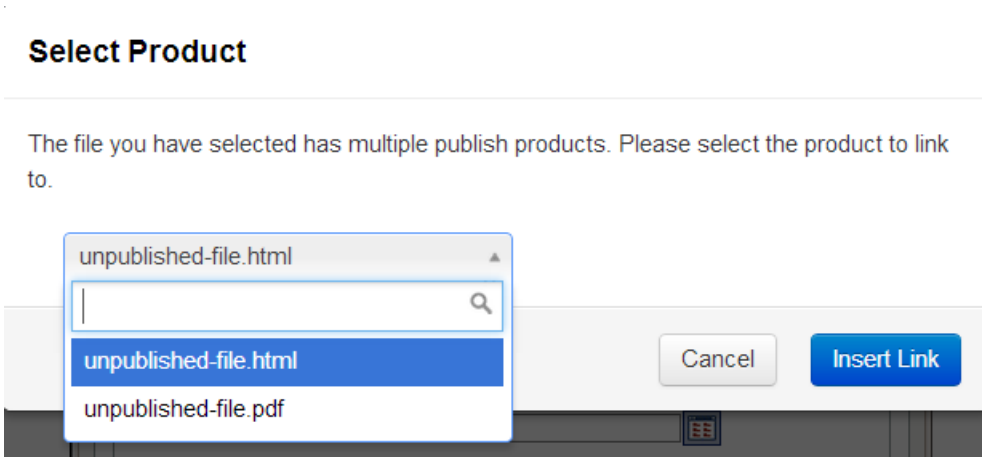
1. Select the text or image for the link.

2. Click the **Insert/Edit Link** tool.

3. From the **Insert/Edit Link** dialog > **General** tab, click the **Browse** icon.

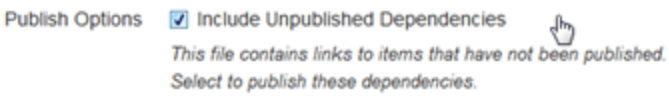
4. From the **Select File** dialog, select the file and click **Insert Link**.

5. From the **Select Product** dialog, the HTML output is usually the default and highlighted, so click **Insert Link**.



6. Click **Insert**.

7. For a publish or scheduled publish, make sure the **Include Unpublished Dependencies** checkbox is selected before publishing.

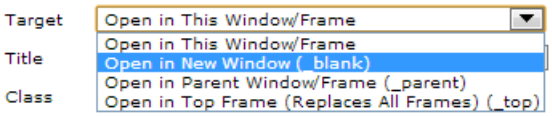


Linking Across Sites within an Account

Links can also be made across sites within an account when inserting a link on a page within the WYSIWYG. The steps are the same as the procedure outlined in the Inserting an Internal Link (Typical) heading, but rather than selecting from production select **Sites** in the breadcrumb, choose the appropriate site, and navigate to the desired file.

Specifying a Link Target

The steps are the same as the procedure outlined in the Inserting an Internal Link (Typical) heading, but the target is chosen from the Target drop-down on the General tab.



As a general rule, when inserting a link to another page on the institution's website, the link should open in the same window. When inserting a link to a page outside the institution's website, or to a PDF, or other similar file, the page should open in a new window. The options for the Target field include:

- **Open in This Window/Frame**: Linking to pages on the institution's website
- **Open in New Window (_blank)**: Linking to pages on another site or binary files
- **Open in a Parent Window/Frame (_parent)**: Used with framesets
- **Open in Top Frame (Replaces All Frames) (_top)**: Opens a page in the topmost parent frame

More Options with Insert/Edit Link Tool

For more information about the additional functionality available on the other tabs, see:

- Links: General Tab
- Insert/Edit Link Popup Tab
- Insert/Edit Link: Events Tab
- Insert/Edit Link: Advanced Tab

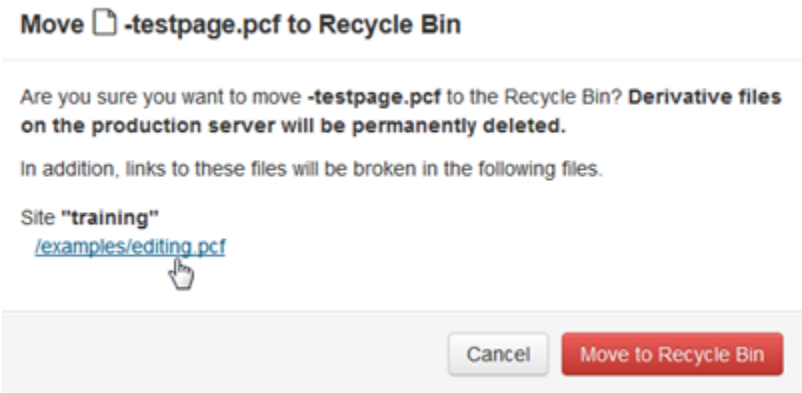
Renaming or Moving a Directory or File

Dependency Manager maintains the correct link association when files or directories are moved or renamed. All the files that link to a moved or renamed file or directory are automatically republished to maintain the correct link.

When a file or directory is either moved or renamed, a prompt that all dependent pages will be republished will appear. This will republish the page based on the current version of the page on the live production server with the new dependency links. If changes have been made but not published to the live site, those changes will still not be published to the live production server but will be available in OU Campus and still saved on the staging server. This includes backed up versions.

Broken Links

When initiating a recycle action, the dialog provides a warning that any derivatives on the production server or publish target will be removed, as well as listing any files that contain links that will become broken.



If content is deleted anyway, a broken link is created. The system has various indications for broken links. Dependency Manager provides informative reporting for broken links and broken assets. When a dependency is lost; for example, a linked-to page or a subscribed-to asset is deleted, the dependency tag, path, and file name are shown within asterisks. For example:

```
*** Broken f:1234 /training/about/filename.html***
```

One way to avoid broken links is to utilize the Include Unpublished Dependencies checkbox from the publish dialog to publish any unpublished content. Dependency Manager reports at page publish time if there is dependent content that has not been published to the target server. This includes content that is linked or referred to by the page that is being published, as well as any unpublished assets. By selecting to include the unpublished dependencies, those unpublished files are published as well. This action prevents broken links (for example) from existing on the current page being published.

This checkbox is only shown if the Dependency Manager is being used on the site, dependency tags are used in the page being published, and one or more of those dependency tags refer to files that have not been published to the target yet.

Final Notes and Reminders

Dependency Manager links are case sensitive. As such, it is advised that paths for links to pages managed in OU Campus are always inserted using the browse functionality.

Dependency Manager inserts Dependency tags into <a> and <link> tags at the “href” attribute automatically, both when the Dependency Manager Scanner is run and when new links are created. However, tags can be manually included elsewhere as desired.
Dependency Manager will not automatically add Dependency tags to any other types of tags, including php, asp, and JavaScript.
Important Exception: Dependency tags cannot be placed within processing instructions or the prologue, which is the instructions prior to the opening XML comment. Entering in Dependency tags within these will cause an error as they will not be able to be rendered.

Dependency Manager renders root relative links (i.e. /directory/page) or absolute links (i.e. http:www.college.edu/directory/page), depending on the site settings. The rendered URL to the Production Site cannot and will not be page relative (i.e., ../page).

Reporting is available with details on which Dependency tags refer to which pages, and which pages are currently subscribing to those pages.

Insert/Edit Image

Insert/Edit Image Overview

The Insert/Edit Image tool is available on the default toolbar for the WYSIWYG Editor. Custom toolbars can be created and assigned to a user or content region utilizing the OU Campus CMS administrator functionality; and if so utilized, the Insert/Edit Image tool may not be shown on the toolbar. Note that using the Images Gadget may also be used to drop an image on a page and will automatically spawn the Insert/Edit Image dialog.

The Insert/Edit Image tool provides access to a plenitude of functionality related to images, image management, and code markup for images. At the very simplest, it can be used to link to an image and provide a description for it, which is usually required. On the other hand, Insert/Edit Image can also be used to:

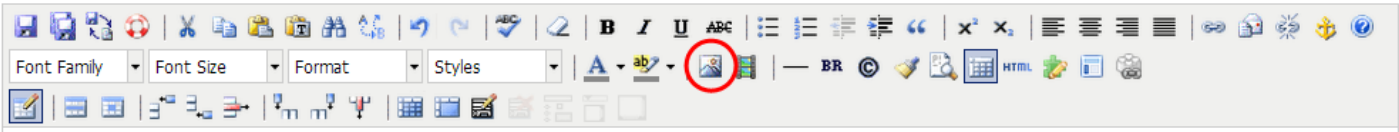
- Upload an image and edit it with the Image Editor
- Manually enter a URL of an image to insert on the page
- Browse to an image that was previously uploaded in order to link to it, including the ability to choose from an auxiliary site
- Provide metadata about an image in the form of an Image Description (alt tag) and Title (title tag)
- Preview an image
- Align an image
- Add space or a border around an image
- Assign a CSS class or styling to an image
- Create an image swap with JavaScript
- Specify an image map

When using the Insert/Edit Image tool, once an image has been selected for insertion on a page, the WYSIWYG Editor seamlessly provides the HTML mark-up and the dependency tag for the link behind the scenes. A dependency tag can also be inserted from within the Source Editor.

In addition to adding an image to a page, the Insert/Edit Image tool includes the Appearance and Advanced tabs, which provide content contributors with the ability to further manipulate images by entering information in a field or selecting it from a drop-down. The Appearance tab provides the ability to modify the appearance of the inserted image with CSS, but without having to know CSS or directly interface with CSS syntax. The Advanced tab, in a fashion similar to the Appearance tab, provides miscellaneous functionality for image manipulation with JavaScript and HTML, including the ability to swap images on mouse over, designate an image map, and add an ID to the IMG tag. For more information:

Appearance Tab

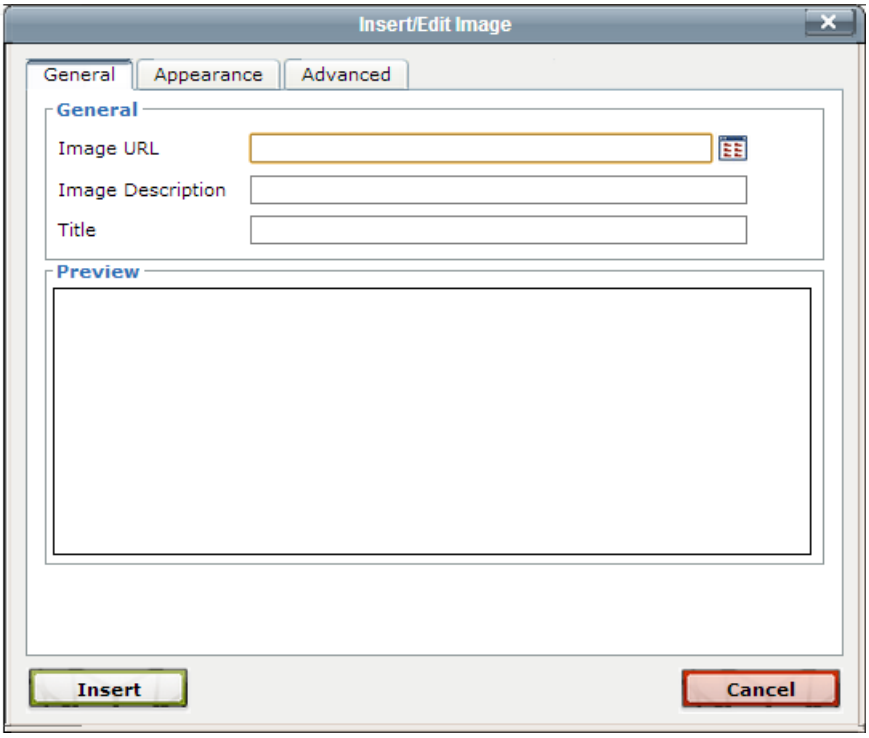
Advanced Tab



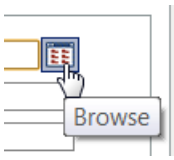
Inserting an Image

1. To insert an image, position the cursor where the image should be inserted and click the **Insert/Edit Image** icon.

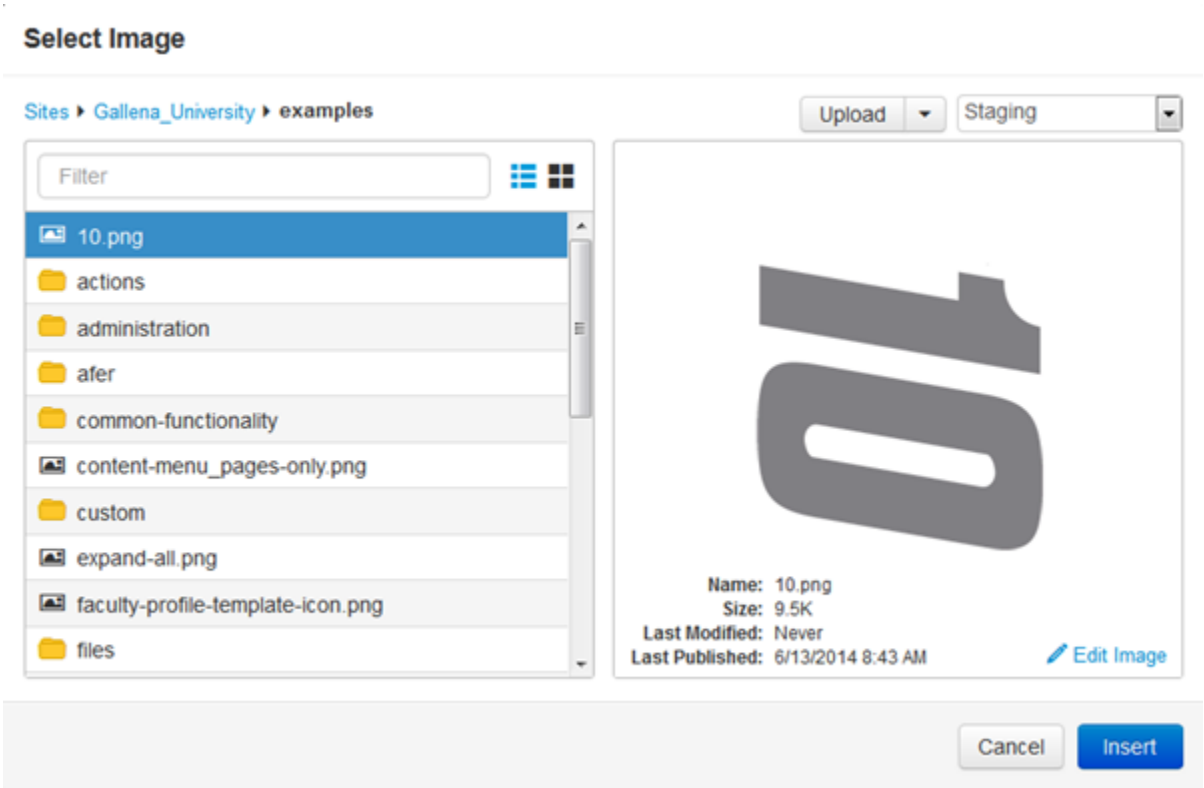
This shows the **Insert/Edit Image** dialog.



2. The location of the image can be manually entered in the Image URL field, but to take full advantage of link management, click the **Browse** icon to browse to the image as in this manner the image will be assigned a dependency tag.



The **Select Image** modal is shown.



3. An image can be selected by doing one of the following:

- Navigating the folder structure via the breadcrumb links. This includes being able to navigate to another site within the account.
- Uploading an image.
- Uploading and editing an image.
- Selecting a different environment from the drop-down; such as the production server or publish target. Staging is the default when Binary Management is in effect.
- Selecting an auxiliary site from the drop-down.
- Filtering by entering one or more characters. The filter is relevant to the file name, including extension.
- Switching between list view and thumbnail view.
- Previewing in the preview pane by single-clicking.
- Double-clicking to immediately select and insert.
- Viewing the preview pane content details
- Clicking through the Edit Image link to edit an image. After editing, click save to return to the Select Image dialog. This edits the physical file and can be useful for quick resizing of an image.

4. Once the image has been selected, click **Insert**. Alternatively, double-click an image in the list or thumbnail view.

5. From the **Insert/Edit Image** dialog, enter a value for the **Image Description** field.

6. Click **Insert**. The image is shown in the context of the page within the WYSIWYG Editor.

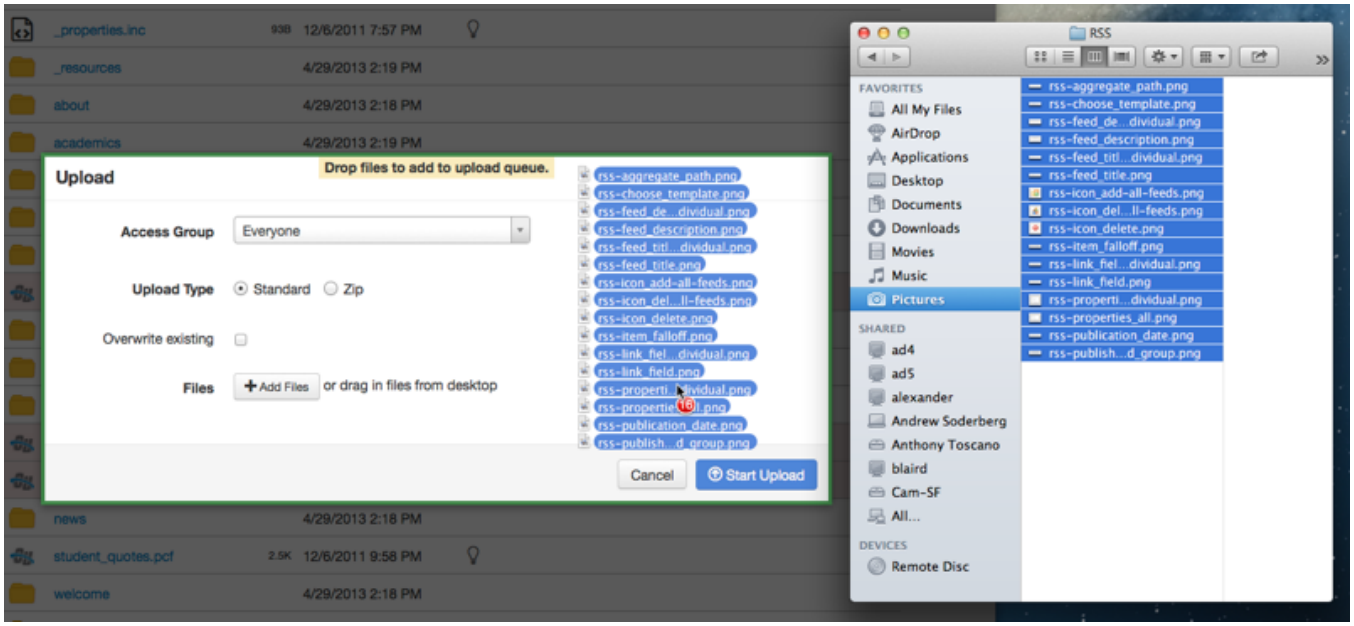
Note: When linking to an image or other binary file from staging the file must be published to production. This can be accomplished by making sure that the **Include Unpublished Dependencies** checkbox is selected.

Editing an Inserted Image

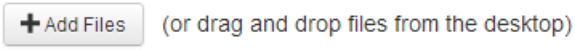
The details of the image can be modified after insertion on a page by clicking the same Insert/Edit Image icon, making the necessary edits, and clicking Update.

Dragging a File to Upload

1. As described above, click the Insert/Edit Image tool, and the Browse icon.
2. From the Insert Image dialog, click **Upload**.
3. Drag the file or files to upload from the local computer to the dialog. (Multiple files may be selected and uploaded at one time. On a PC, use Control+Click, Shift+Click, or click and drag to select multiple files. For a Mac, use the Command key to select multiple files.)



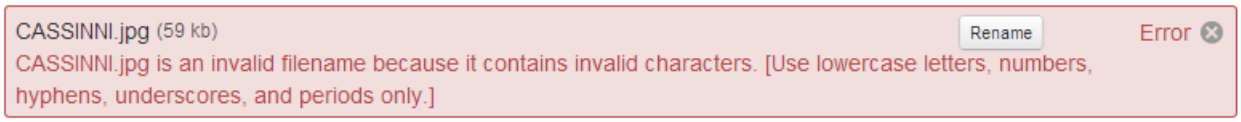
4. Alternatively, click the **Add Files** button to browse and select local files.



5. If necessary and available, chose an access group for the files. This will limit the ability to access the image to insert it on a page from within the WYSIWYG to members of the group.
6. The ability to overwrite files may be enabled and available by clicking the **Overwrite Existing** checkbox.
7. Files may be renamed at this point by clicking **Rename**, entering the new file name, and clicking **OK**.

Note that after renaming a file, the modification can be reverted by clicking **Revert**.

8. Click **Start Upload** to upload the files. For a successful upload, the Upload dialog is automatically dismissed and the uploaded file may now be selected for insertion.
   During the upload the status is shown as **In Progress**, which may or may not be visible. An error message is shown if a file could not be uploaded, which may be the case if it does not follow file naming conventions configured by the site or if the file exists already and the Overwrite Existing checkbox was not selected.



Some errors may be fixed by renaming the file or selecting Overwrite Existing and clicking **OK** and **Start Upload** again. When completed, the green success message is display, **Done**. Click **Close** and select and insert the image from the **Select Image** dialog.

Example of Successful File Upload After Correction

Additional Information and Reminders

- The ability to upload files is inherently available for users, level 6 or above. Lower level users (1–5) can be granted the rights to upload via the user's settings.
- The permission to overwrite files to which they have access can be granted to user levels 1 through 8.
- To import multiple files using only one selection and containing subfolders, use the Zip Import feature.
- Zip Import is available to users Levels 6–8 through the user's settings.
- **Note**: All binary files including images are uploaded to the staging server and must be published to the public-facing web server. Image files can be manually published with any publish action, or if having been inserted on a page without publishing, the Dependency Manager will provide a checkbox on the Publish dialog so that any unpublished dependencies are also published.

Decorative Images

Decorative images are images for which no <alt> descriptive image tag is required. Inserting decorative images must be enabled for each site by an administrator. This can be accomplished from Setup > Sites > WYSIWYG Editor > Decorative Images. The default, Disabled, means that the Decorative Image checkbox is not available and that an Image Description must be added. For more information:

Setup Sites > WYSIWYG Editor Panel

Using Decorative Images

Once enabled, the Insert/Edit Image dialog in the WYSIWYG editor allows users to select a checkbox indicating that the image to be inserted is a decorative image and to omit the image description.

Image Editor

Image Editor Overview

The Image Editor allows images to be resized, cropped, rotated, and resized with zoom directly in the OU Campus system. Images can be uploaded and edited all in one operation. The ability to edit an image helps ensure large images are properly resized before being transferred to the web server. Additionally, images can be saved and renamed. Access to the Image Editor is level dependent. Those who can upload files can use the Image Editor to upload images and edit existing images, but cannot overwrite any existing image with the same file name. Those with overwrite permissions are able to replace existing images. The Image Editor can be accessed using the following methods:

- Within the Pages list view by clicking a linked image
- Within the Pages list view by clicking Upload and using Upload and Edit
- While inserting images on a web page using the WYSIWYG Editor > Insert/Edit Image dialog
- When editing or creating a new Web Content Asset, the mini-WYSIWYG Editor > Insert/Edit Image dialog
- While inserting images on a page using the Source Editor

LDP Image Galleries are another way users can add images to a site in the OU Campus system. However, this function is not related to the standard Upload and Edit Image feature and requires that Live Delivery Platform (LDP) be enabled. For information about creating LDP Image Galleries:

Image Galleries

Image file types support by the Image Editor is browser dependent. The following file types commonly used for web pages can be edited and saved with the Image Editor with the most commonly used browsers:

- JPG
- PNG
- GIF
- BMP

For a complete reference of browser support for image formats, see:

http://en.wikipedia.org/wiki/Comparison_of_web_browsers#Image_format_support

Image Editor Restrictions and Requirements

When an image is edited through The Image Editor in OU Campus, it will be recompressed once it is saved. When using lossy file formats such as JPG, this can cause a visible degradation in image quality. As a best practice, crop or resize images to the exact size needed on the page before importing them into OU Campus. Furthermore, using images saved in a lossless file format (such as PNG) in the Image Editor will avoid losses of quality due to recompression.

The image size is dependent on two factors: the browser and the amount of memory allocated to the browser by the parent machine. In testing a fairly large image, 13260 x 3955 pixel (27 MB), was used and rendered in 198 ms. Performance of image rendering is dependent upon each individual user's machine and Internet connection. In short, every time a user tries to load an image, large or small, jpeg or any other extension, the image editor relies on the browser to provide the pixel information.

If working with an image that cannot be edited, log out of OU Campus, quit and relaunch the browser. This will free up browser-allocated RAM and may resolve the issue.

If pictures do not update to the edited version in Preview mode, the Image Editor and web browser might be clashing. A browser stores copies of pages of visited pages, then displays these stored files upon the next visit. This way, the browser is not being forced to load the page anew with each visit, which takes more time than viewing a stored copy. This storage of pages is called a cache. However, this cache can sometimes pose a problem when viewing the most updated version of a page is needed. Clear the browser's cache to ensure viewing of the most recent versions of a page. Reloading or refreshing a page in a browser is usually sufficient and there are more invasive method of clearing all browser data in each browser's settings.

Image Editor Tools

The Image Editor has a predefined set of tools that allow users to customize images as they wish. For more information about the tools available in the Image Editor:

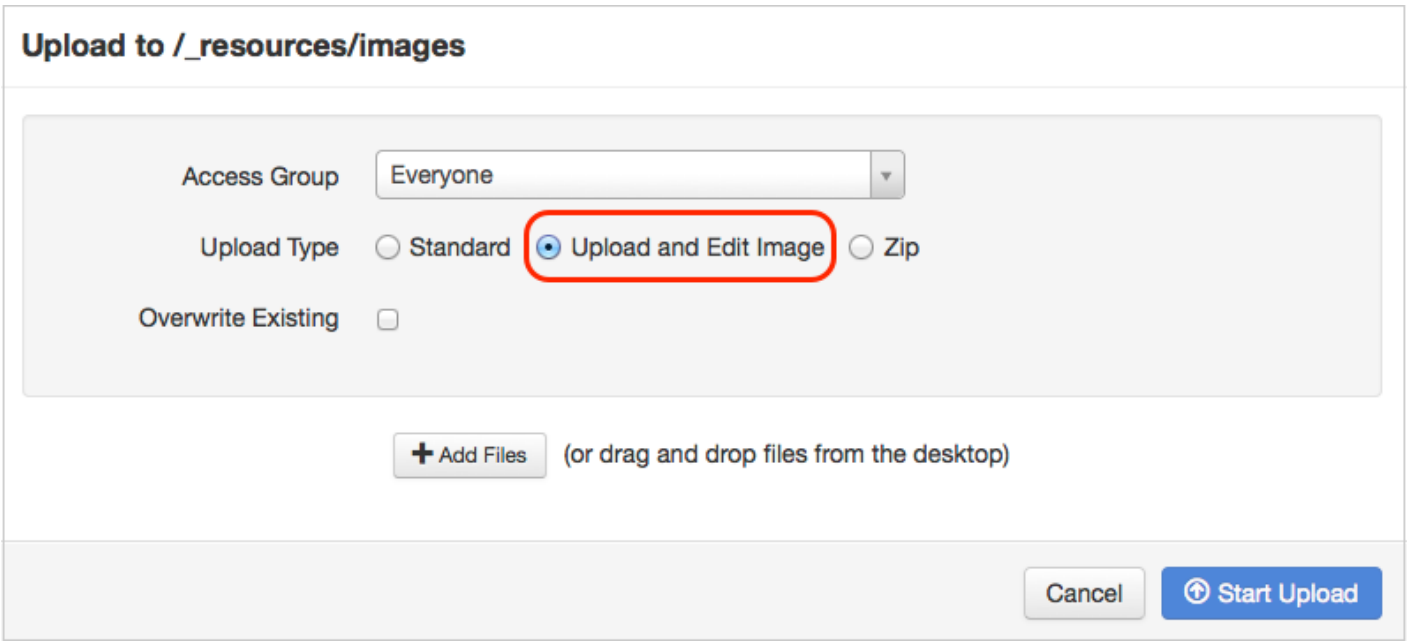
Image Editor Tools

Image Editing on Upload

Images imported into OU Campus can be edited on import. To edit images when importing:

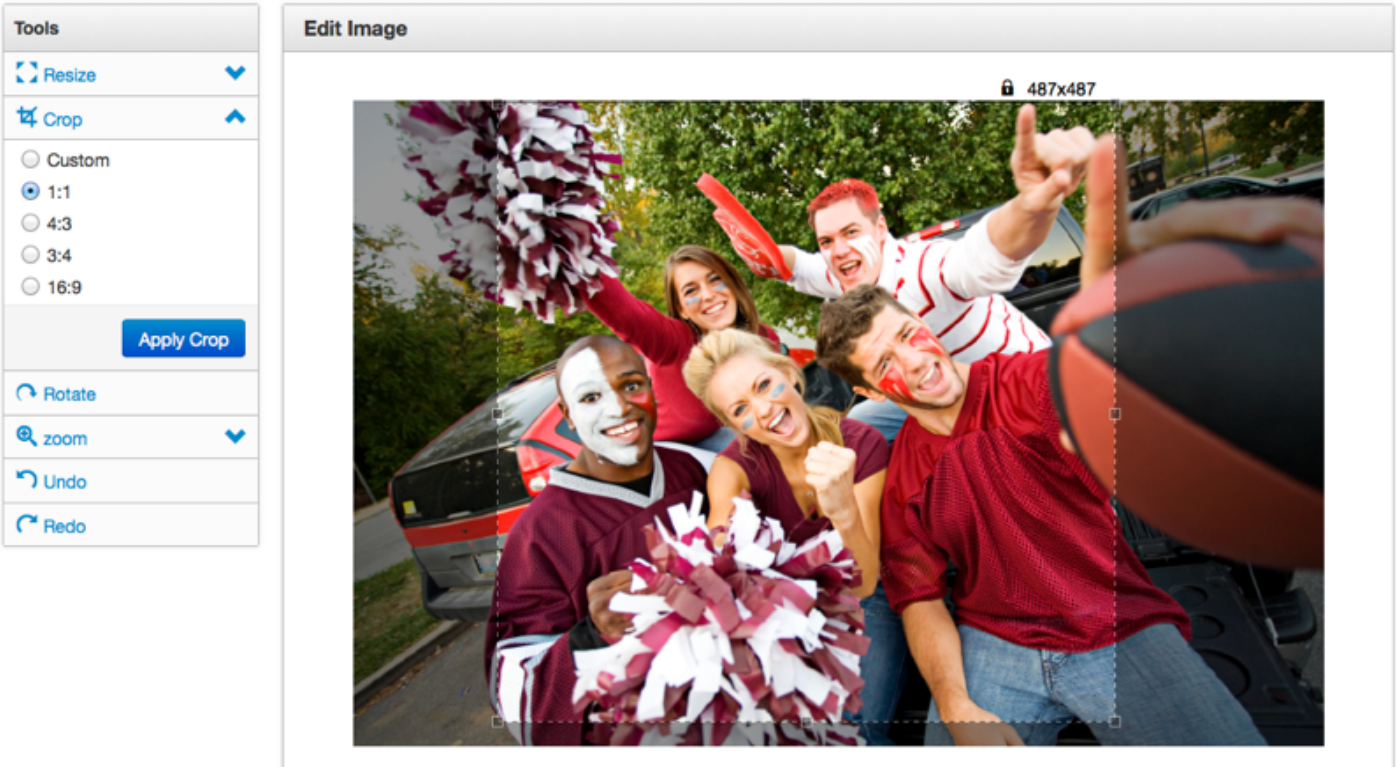
1. Click the **Upload** icon in the **Pages** list view.

2. In the **Upload** dialog, select **Upload and Edit Image**.



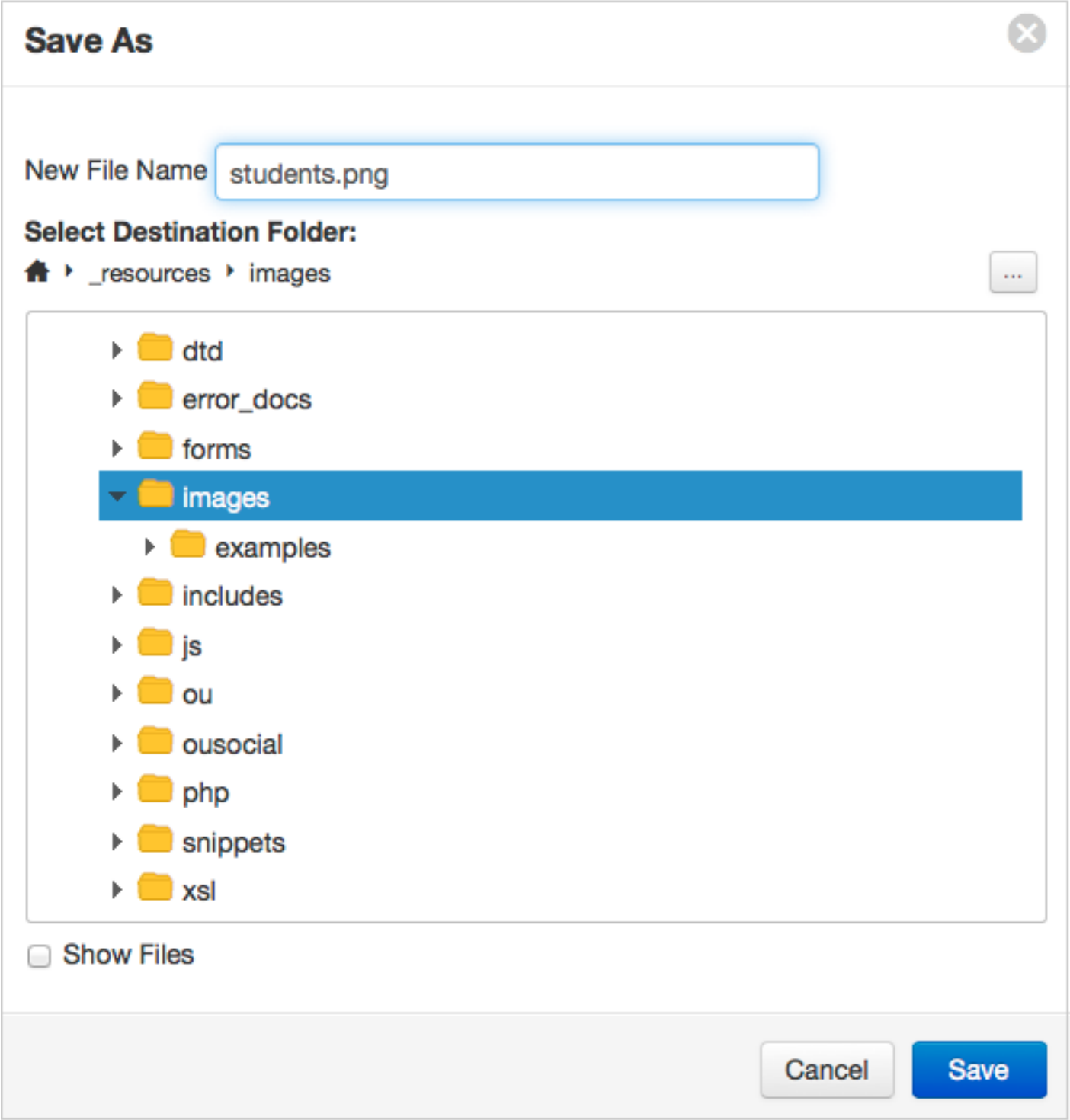
3. This automatically opens the local computer's File Explorer (PC) or Finder (Mac). Locate the file and click **Open**.

4. The image is opened in the **Image Editor** where changes can be made to the file.



5. When all the changes have been made, click **Upload.**

6. A dialog will appear. Enter the **New File Name** for the file, including the extension, and use the browser to **Select Destination Folder**. If needed, select the checkbox for **Show Files**.



7. Click **Save**.

The user is returned to the Pages list view inside the folder where the image was uploaded.

Image Editing from Pages List View

Any image file can be edited from the Pages list view. The image editor can be used to edit images already uploaded to the staging server.

1. Navigate to the **Pages** list view by selecting **Content > Pages** from the global navigation bar.

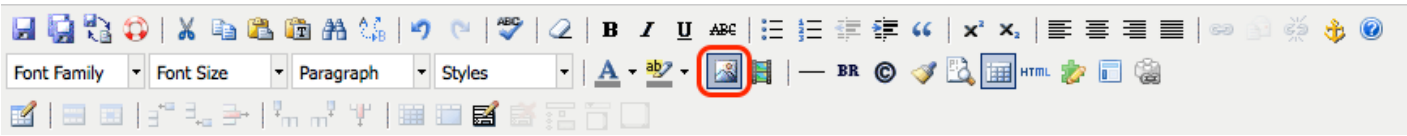
3. Hover over the target row and click **Edit**, or click the hyperlinked image name.

4. The **Image Editor** will open and the image can be modified.

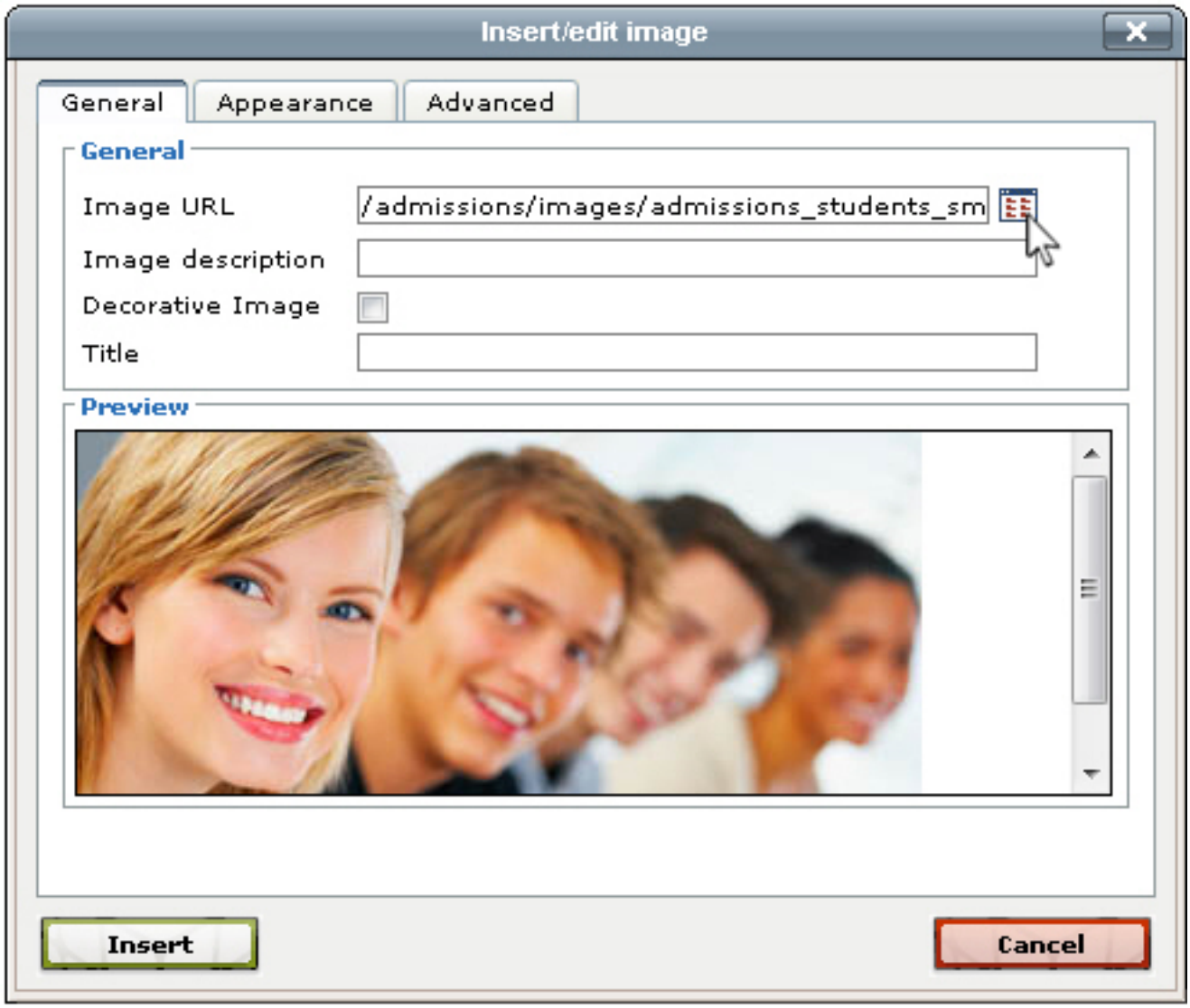
Editing Images in WYSIWYG Mode

To edit any image while using the WYSIWYG editor, click the Insert/Edit Image icon in the WYSIWYG toolbar. Any image can be selected and edited using the Edit Image button in the file selector window. Additionally, users can upload and edit any image from this same window by clicking the Upload button.

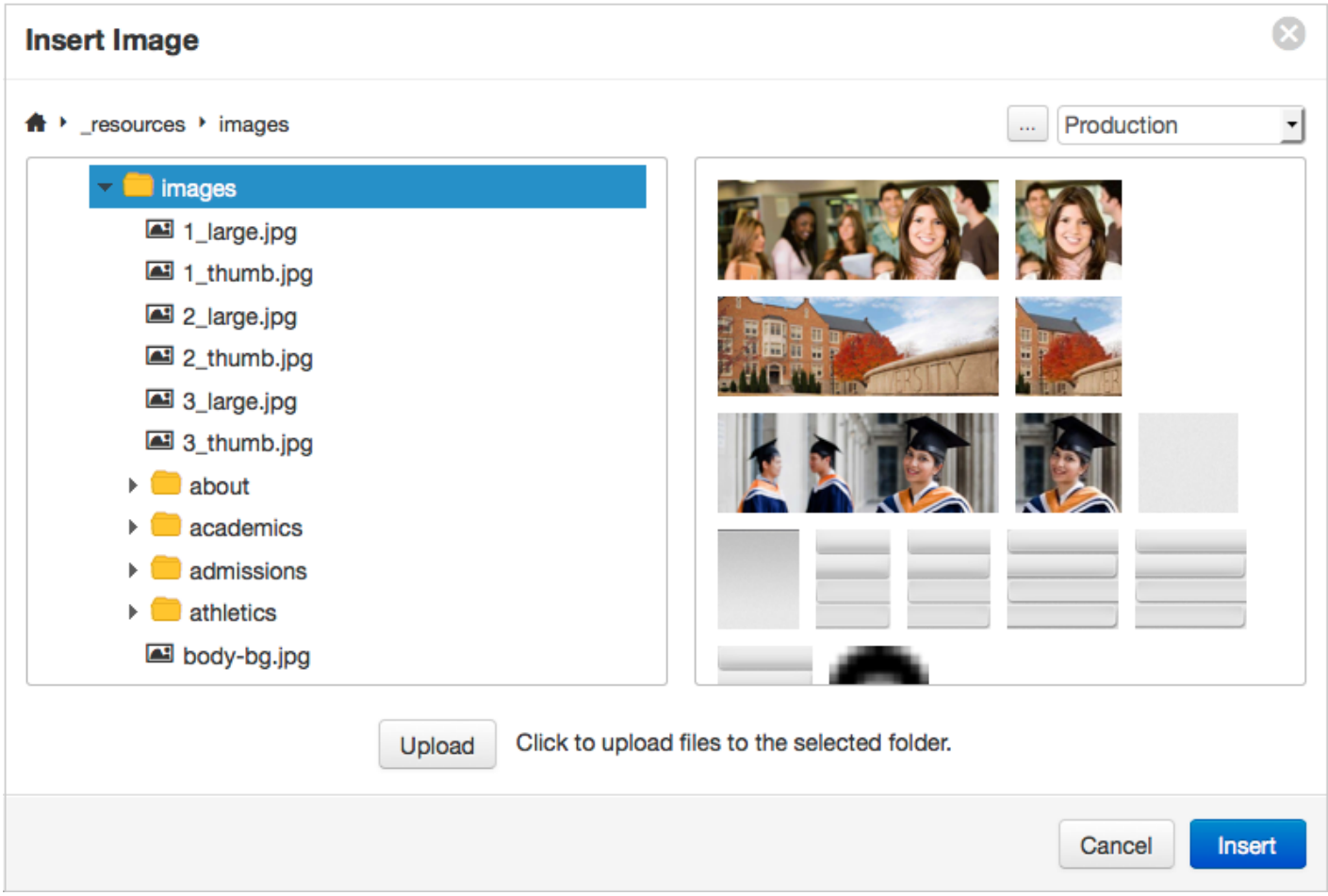
1. Click the **Insert/Edit Image** icon on the WYSIWYG toolbar.



2. Click the **Browse** icon to change or edit an image.



3. Expand a folder or double-click to view thumbnails of all the images contained within that folder. Click a thumbnail to show a preview of just the selected image.



4. Choose one of the following actions:

- Click the **Edit Image** button to edit the file displayed in the **Image Preview** window.
- Click the **Upload** button to open, edit, and upload a file from a local computer.
- Click the **Upload & Edit** button to upload a file from a local computer and start the Image Editor.

Final Notes

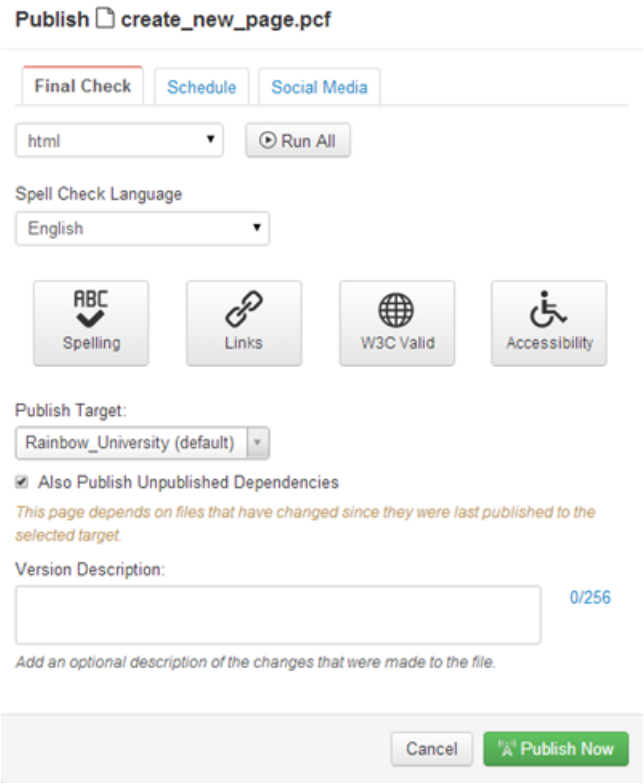
The edited image must be republished in order to appear correctly on the rendered webpage. This may be initiated with a page publish by selecting the checkbox to publish unpublished dependencies. Or it may be necessary to manually publish the image. If the image does not appear correctly, refresh the browser or clear the browser cache as the previous iteration of the image may have been saved by the browser. This action can be found in various places in browsers' settings and for some browsers/platforms, this can be accomplished by click CTRL+F5 or CTRL+ the Reload icon. Otherwise the edited image may not appear as expected.

Publishing a Page

Publish Dialog

This topic provides an overview as to the features and functionality that can be available from the Publish dialog depending upon site configuration. A brief overview is provided on this page and the bulleted items are linked to topics with more information, if applicable. Keep in mind that content can be "published" in other manners as well, such as with a find and replace action, directory or site publish, an expire, triggered publish, upload to the production server, or via a template that automatically publishes specific files upon initial creation.

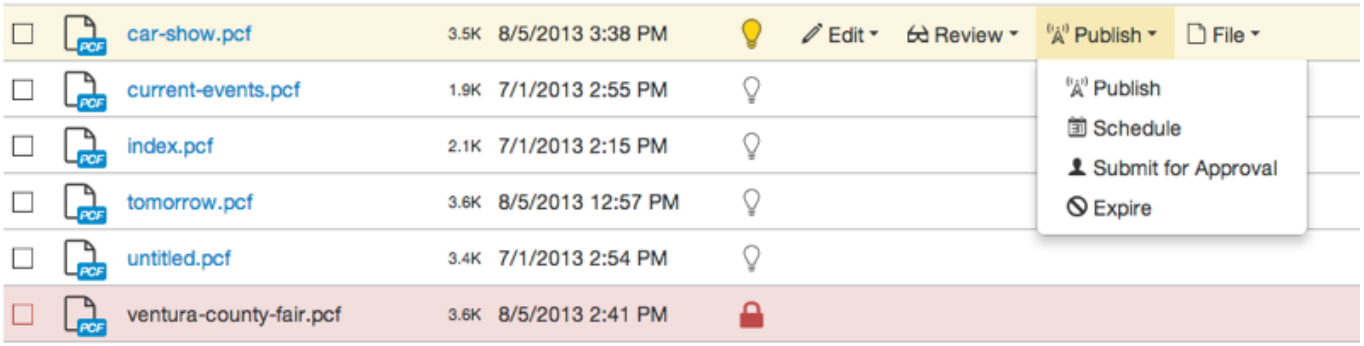
Example of the Publish Dialog



Navigating to the Publish Dialog

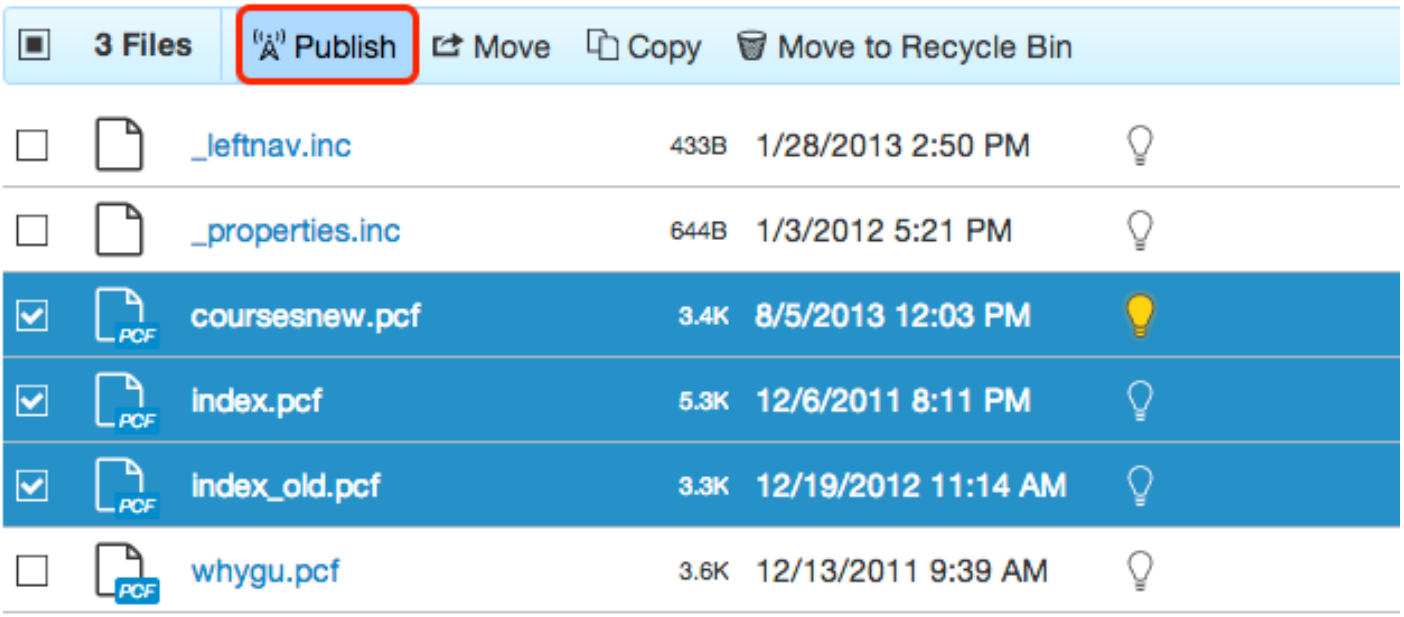
The Publish dialog may navigated to as follows:

- **Pages List View**: The Publish dialog can be access for a checked in or a checked out page: Hover and from the **Publish** menu, choose **Publish**.



- **Page Action View**: The Publish dialog can be access for a checked in or a checked out page from the page action toolbar, which is available in preview/edit mode. The button is only shown if the user has publishing rights.

- Multiple pages can be selected for simultaneous publish. Select each checkbox for a page or use the select all checkbox in the header row. The **Publish** option is only made available if the selected pages would otherwise be available for publish by the user. In other words, if a page is selected that is checked out by another user, the Publish button will not be available.



Publish Dialog Reference

Final Check Tab

- **Final Check**: Includes a set of checks that can be run manually by the user or can be set to automatically run by the system administrator.
- **Output Selector**: If more than one output is created by the template configuration (e.g., both an HTML page and a CSV are created) and the alternate is a type on which the checks can be run, the selector can be used.
- **Run All**: Click to run all available checks on the selected output. See Final Check.

- **Spell Check Language**: The default language (as determined by the Locale setting) for the spell check dictionary is shown, but a different dictionary can be selected by which to run the spell check against.
- **Spelling**: Checks the spelling on a page in the given language selected in the Spell Check Language box.
- **Links**: Checks for broken links on the page. Links may be broken due to unpublished dependencies. If available, the **Also Include Unpublished Dependencies** checkbox can be selected to publish files that have been linked to, but not yet published. See Dependency Manager.
- **W3C Valid**:Checks a page for valid HTML and XHTML markup, depending on the schema setting.
- **Accessibility**: Checks the accessibility of a page complies to the standard defined by an administrator (i.e., WCAG, Section 508, Stanca Act, or BITV).
- **Publish Target**: If available, a publish target other than the production server may be selected.
- **Also Include Unpublished Dependencies**: This checkbox allows a user to publish all unpublished dependencies for the page at the time of publish. When enabled, the Dependency Manager reports at the time of page publish if there is dependent content that has not been published to the target server. This includes content that is linked or referred to by the page that is being published. This prevents broken links and images from occurring on the current page being published. This option only works if Dependency Manager is enabled, dependency tags are being used on the page being published, and one or more of the dependency tags in use refer to files that have not been published to the current target.
- **Version Description**: This will allow a version description to be included in order to indicate what was updated and why the page is being published. This can be used when choosing previous versions in which to revert.

Schedule Tab

- **Schedule**: This tab allows for a scheduled publish, rather than an immediate publish, of the page. A user can select the date and time of publish, and choose to repeat the publish according to a schedule if desired. A user is also notified of publish, and can choose to be notified in the user's OU Campus Inbox only or also to the user's external email if configured in the user's settings.

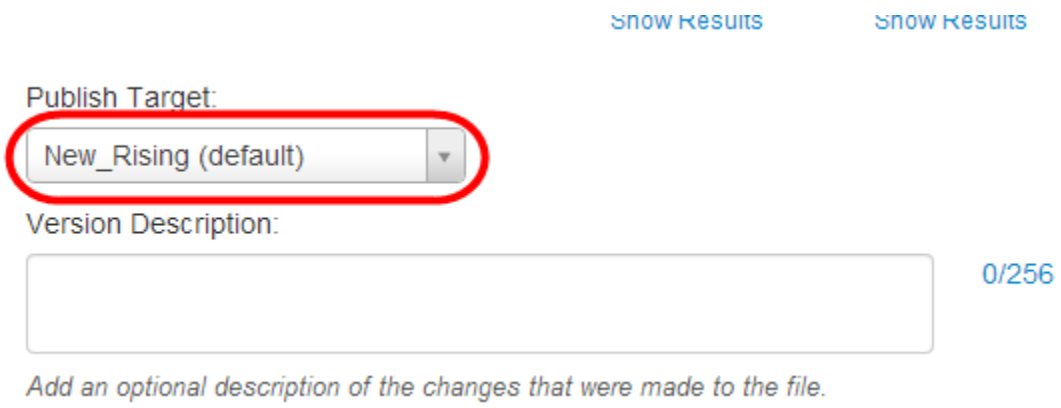
Social Media Tab

- **Social Media**: This tab provides options for the user to include a publish to Twitter or Facebook with the page publish. A shortened URL for the page can be added by clicking the **Add URL** link beneath the respective social media fields.
- **Twitter**: If one or more Twitter accounts have been configured, the system sends a tweet to the selected Twitter accounts upon publish. A shortened URL can be added that directs to the published page. Tweets may be up to 140 characters in length. Default text can be configured at the account and/or site level and edited at the time of publish.
- **Facebook**: If one or more Facebook pages have been configured, the system sends a post to the selected Facebook pages upon publish. A user may add a shortened URL that directs to the published page. Posts may be up to 420 characters in length. Default text can be configured at the account and/or site level and edited at the time of publish.

After configuring the options, click the **Publish** to finalize the action.

Selecting a Publish Target

If Multi-Target Publish has been enabled for the site and alternative publish targets defined, users with the proper access rights can publish to it. The defined publish targets are available in a drop-down menu. When within the Pages view of the site, the available servers, including the staging, production, and additional publish targets, are shown in tab view.

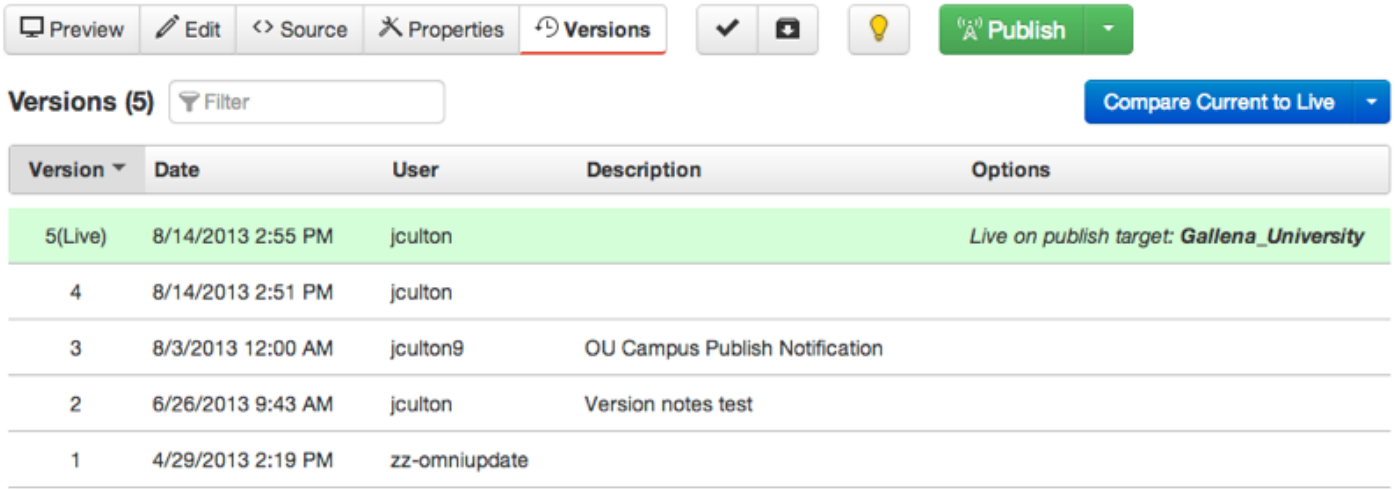


For more information regarding Multi-Target Publish, please see:

Publish Targets

Viewing the Publish Notes

Once a file has been published, the message input before the file is published can be viewed within the versioning system. To view the notes, check out a page from Content > Pages. Hover over Review on the page row and choose Versions. This will present a log of the publishes and backups, including any messages.



MultiFile Select

Multiple files may be selected using the checkbox for a file, or by using the to select all files. However, if multiple files are selected in this method, publish only becomes available if the files are checked in or checked out to the current user.

Final Check

Final Check Overview

Final Check gives a content contributor the capability to perform a series of quality assurance tests on a page before publishing. These include spell checking, link checking, W3C validation, and/or accessibility compliance. An administrator can configure the options, if any, to auto-run when an OU Campus user publishes a page. Even if Final Check is not configured to run automatically at the time of publish, the site may configured so that a user may manually run any enabled checks.

The available Final Check options are based on the activated Page Check options. For more information about Page Check and available options, see:

Page Check

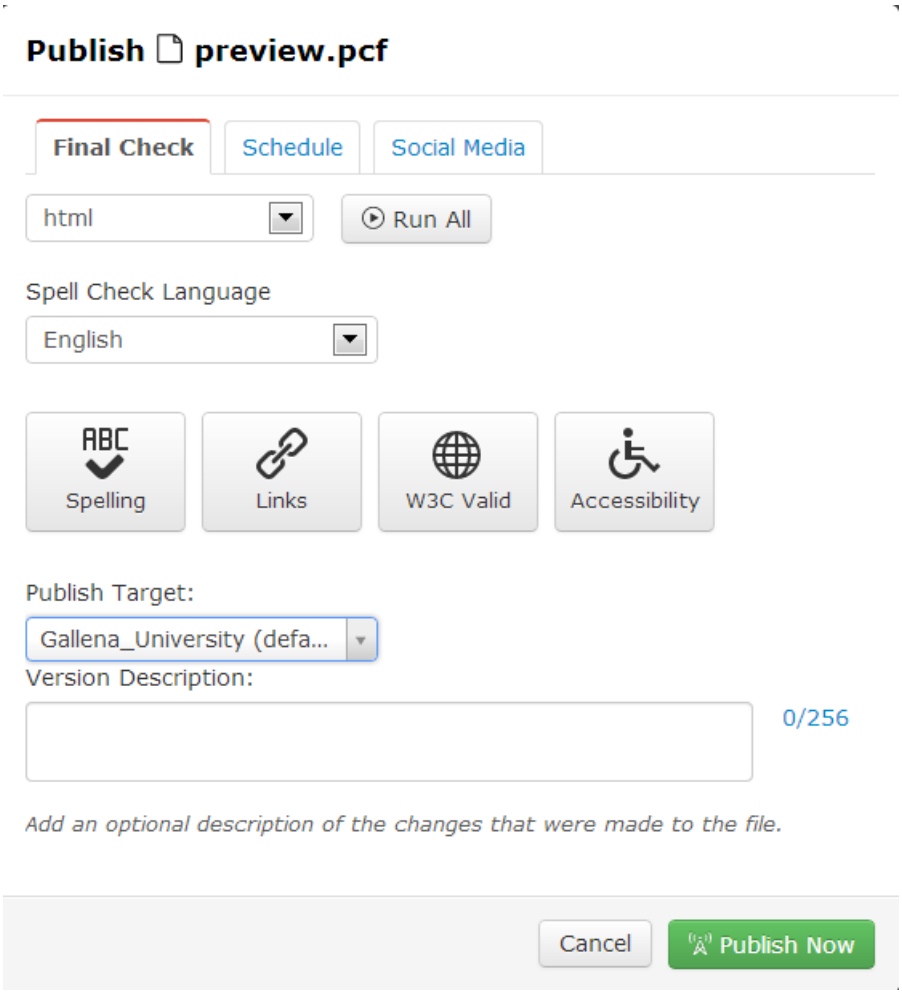
Running Final Check

Final Check can be configured in one of two ways:

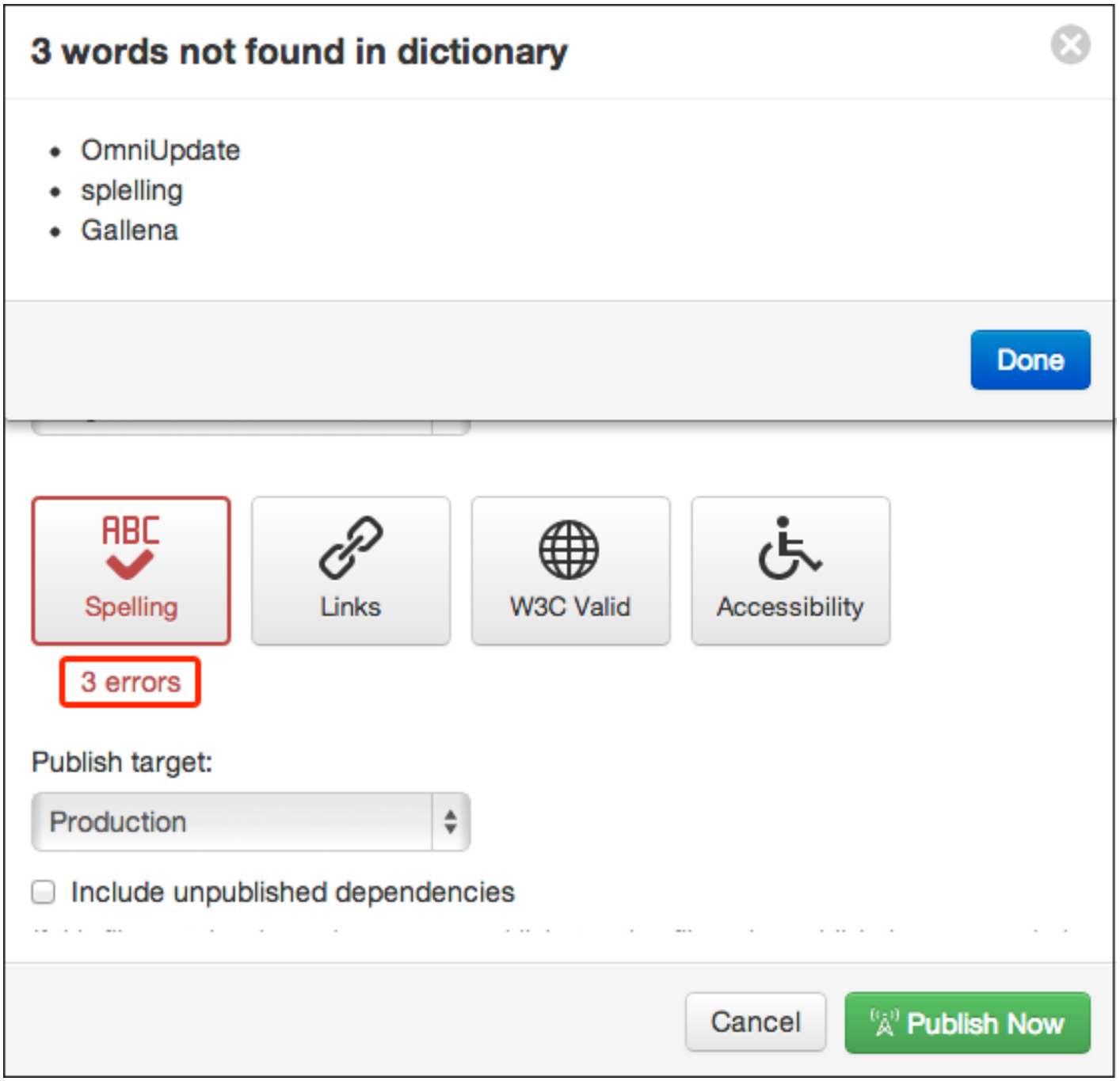
- To be forced to be run all the checks or a selective combination of page checks at the time of page publish
- To allow users to choose which page checks, if any, to run at the time of page publish

If Final Check is configured to force Final Check, any time a page is published by clicking on the Publish button from the page preview or edit view, or the Publish menu for the page from the Pages list view, any selected Final Check options will run. They must run to completion prior to the Publish button at the bottom of the screen being available to complete the publication process. Once the check has completed, click any of the indicated errors to view them. It is strongly advised that the errors be resolved prior to publishing the page. Note that the identification of errors, warnings, or problems does not prevent the page from being published.

If Final Check is not configured to run automatically, click Run All to run all checks, or click any of the enabled checks to selectively run checks.

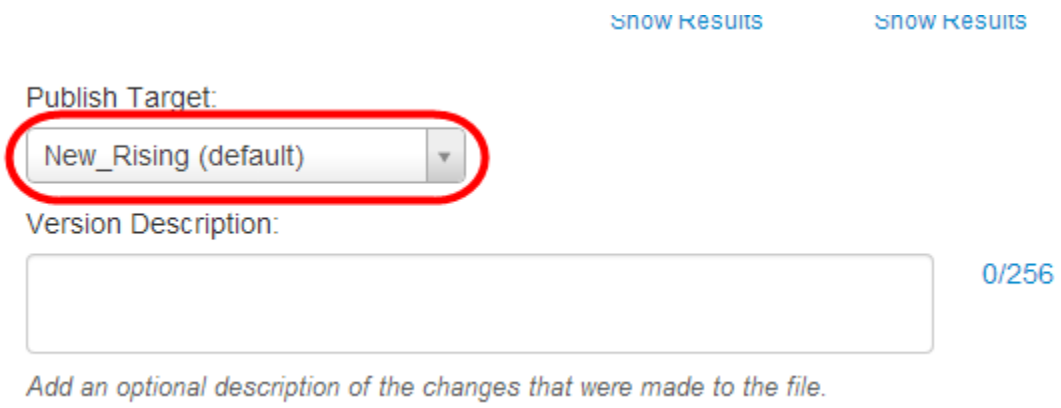

Publish preview.pcf
Final Check
Schedule
Social Media
html
Run All
Spell Check Language
English
Spelling
Links
W3C Valid
Accessibility
Publish Target:
Gallena_University (defa...
Version Description:
0/256
Add an optional description of the changes that were made to the file.
Cancel
Publish Now

Example of Spell Check Errors



With Multi-Target Publish

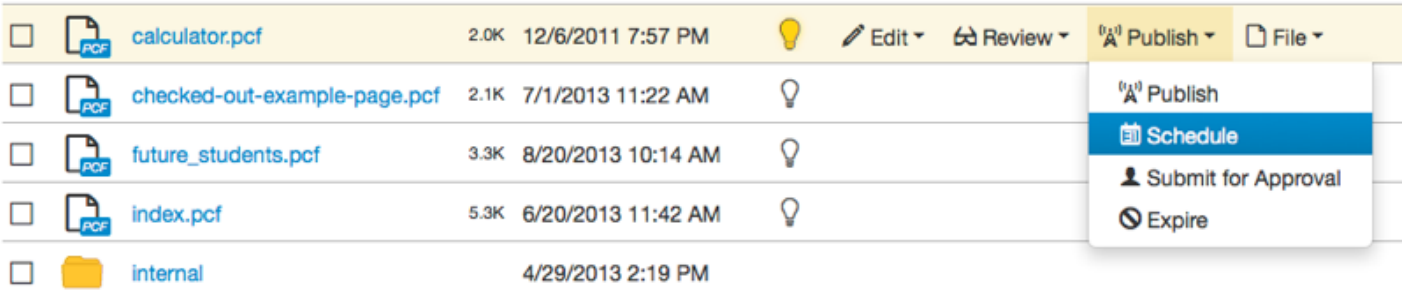
If additional publish targets are enabled for the site, they can be selected at the time of publish.


Show Results
Show Results
Publish Target:
New_Rising (default)
Version Description:
0/256
Add an optional description of the changes that were made to the file.

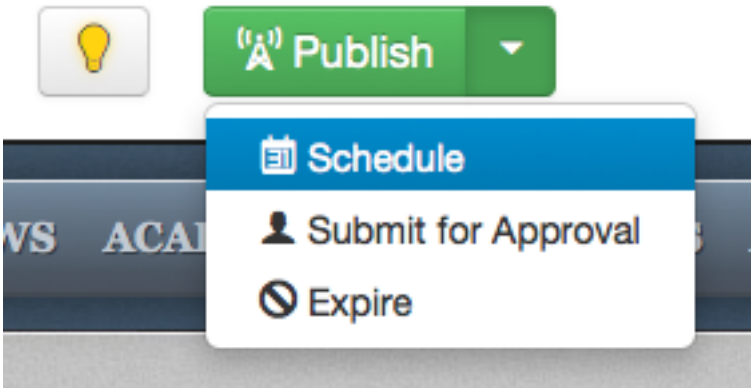
Schedule

Schedule Overview

When users want to publish content, but wish to do so at a later date, they can utilize the Scheduled Publish tool. A scheduled publish can only be canceled or modified by the user who set the schedule or a Level 9 or 10 administrator. If a new RSS item has been added to a page, but not yet published, the RSS item is added to the feed and the feed is rebuilt with a new page publish. The Schedule Publish tab is part of the Publish dialog, which can be accessed from the Pages list view by selecting **Pages > Content** from the global navigation bar.



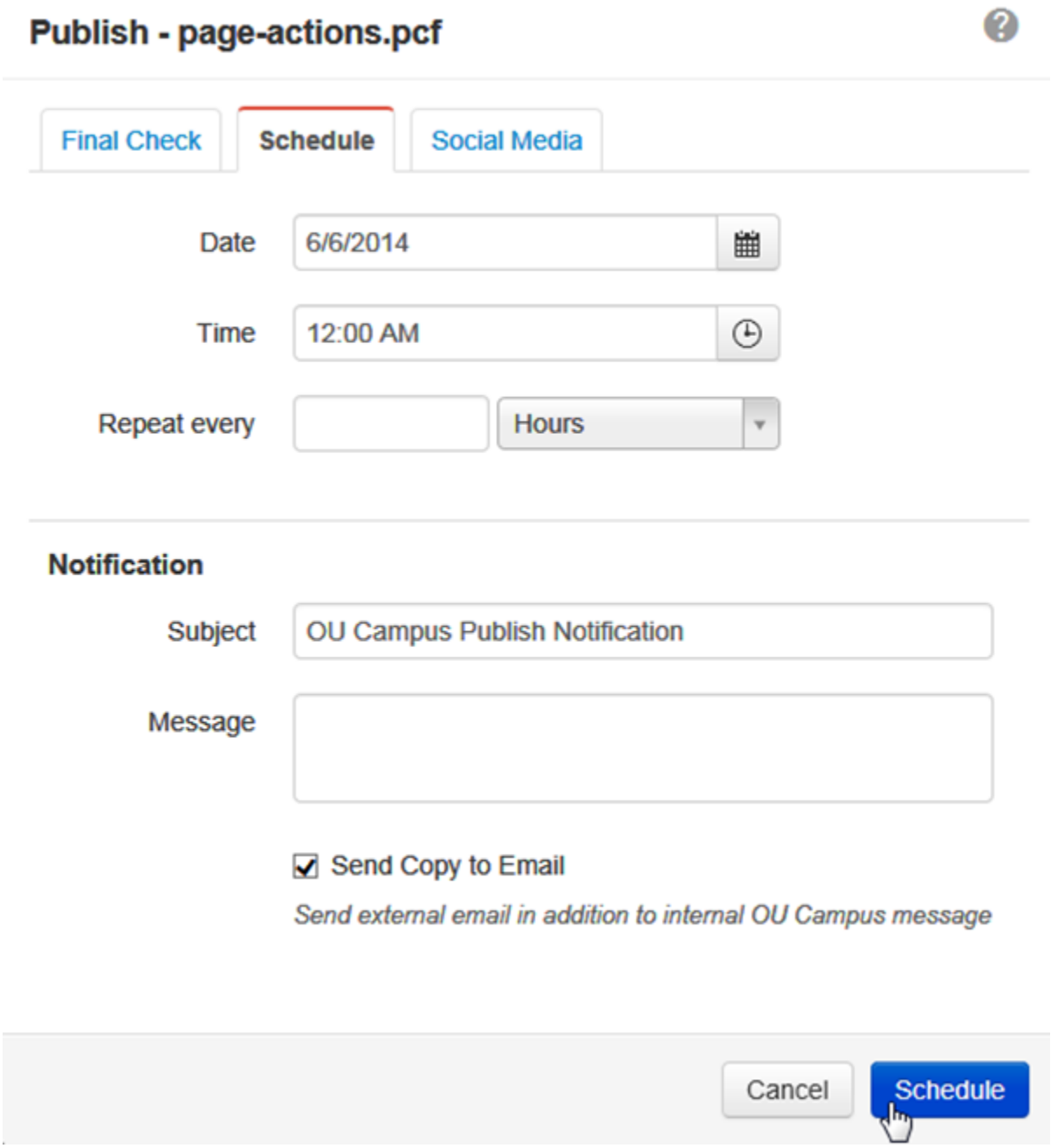
Additionally, selecting a publish can be performed from any screen that contains the Page Actions toolbar.



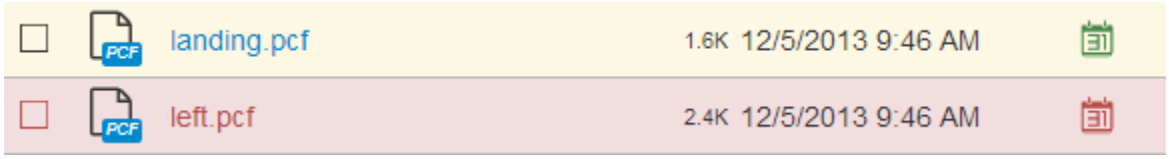
Schedule Tab

When users select the Schedule tab of the Publish dialog, the following elements are displayed:

- **Date**: The target date the user wants the page to publish on.
- **Time**: The time at which the scheduled publish will take place.
- **Repeat Every**: Allows users to repeat the publish by specific amounts of time using the text field and drop-down selector.
- **Subject**: Optionally, users can send an external email in addition to the internal OU Campus message. This field lets users add a subject line to that email.
- **Message**: Allows users to include a brief message about the publish in an external email.
- **Also Email Me**: If selected, the option sends an external email to user in addition to the internal OU Campus message.



After a scheduled publish has been performed, the content's status will change in the Pages list view. A green calendar icon indicates that the page is checked out to the current user because the user has scheduled a publish to occur. Other users' scheduled publishes will appear as red calendars.



Performing a Scheduled Publish

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar.

2. Hover over the target item's row and select **Schedule** from the **Publish** menu. Additionally, navigating to a view that displays the **Page Actions** toolbar and selecting **Schedule** from the drop-down menu on the **Publish** button will accomplish this.

3. Click in the **Date** text field to display a calendar widget and select a date. Users can scroll through the months of the calendar using the arrows at the top of the calendar.

4. Click in the **Time** text field to display a time selector and set the target date for the publish.

5. In the **Notification** section, a checkbox may be selected to **Also Email Me**. This sets an optional notification email that can be sent when the page is published. If selected, fill out the fields in the **Notification** section.

7. If preferred, select the **Final Check** tab and run any tests necessary before publishing.

8. Click **Schedule**.

When the page is published, the notification email is sent through workflow, and if the option checkbox was utilized, through external email.

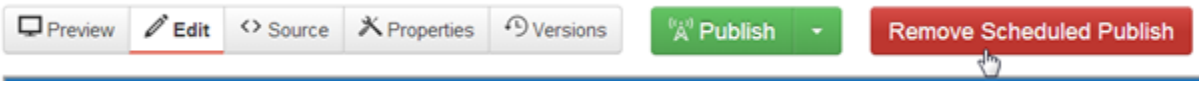
Removing a Scheduled Publish

A scheduled publish can also be removed from a page or file. If a user attempts to immediately publish content that is already scheduled for publishing at a later date, they will be unable to perform this action until the scheduled publish assignment is removed. To remove a scheduled publish:

1. Navigate to the **Pages** list view by selecting **Content > Pages** from the global navigation bar.

2. Click the green calendar icon on the target item's row to display the **Remove Scheduled Publish** dialog.

2. Click the **Remove** button to cancel the scheduled publish.



To remove the scheduled publish using the Page actions toolbar:

1. **Preview** the scheduled page, or enter into the pages **Edit** mode through **DirectEdit** or by using the **My Checked-Out Content** gadget.

2. Click the **Remove Scheduled Publish** button in the page actions toolbar. A dialog will appear.

3. Confirm by clicking **Remove**.

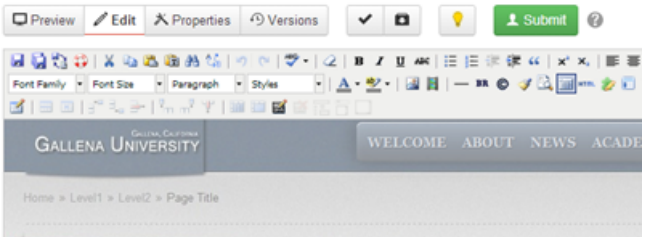
When the page is published, the notification email is sent through workflow, and if the option checkbox was utilized, through external email.

Submit for Approval

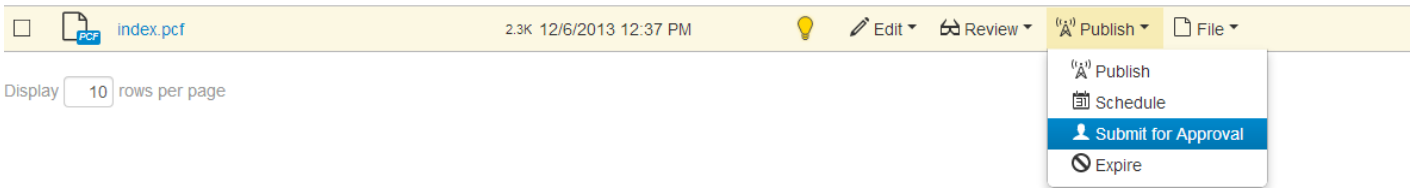
Submit for Approval Overview

If an approval workflow is in place, and users, content areas, or a content type have had an approver assigned, then a user may have to send the content for approval rather than being able to publish directly. Content must be checked out before it can be submitted for approval.

Instead of a Publish item on-screen, they will see a Submit button or Submit for Approval item on the Publish menu.



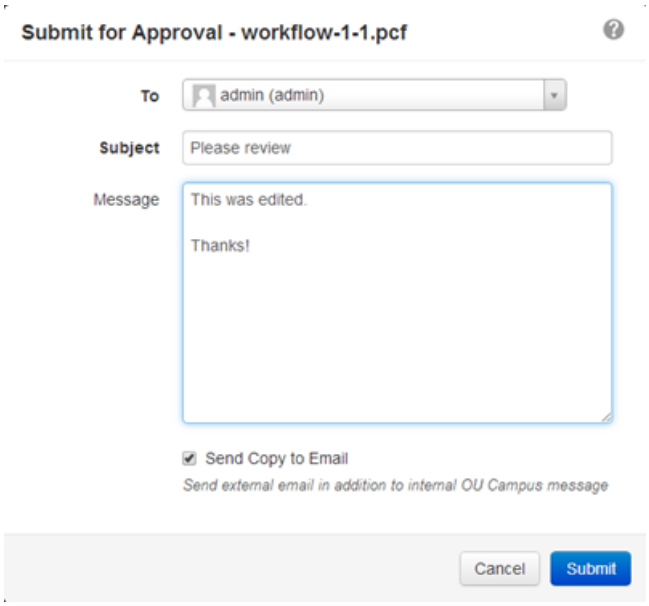
Users Level 4 and greater that have not otherwise had an approver assigned, also have this functionality available as an option and may choose to use the Submit for Approval feature to send the content to another user.



Sending the page to an approver transfers the checked-out status from the current user to the approver to whom the page is sent. The sent content is shown in both the user's and the approver's Workflow with a status of Pending Approval. Content in an approval workflow is also shown on the Pending Approval report.

The Submit for Approval dialog includes the following items:

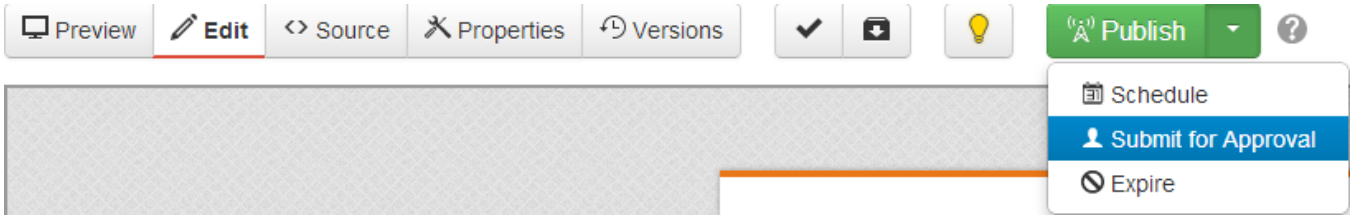
- **To:** Users select an approver from the drop-down to send the content for review. If the approver is enforced, then the drop-down is unavailable and the content must be sent to the enforced approver.
- **Subject:** Required. A brief subject used to help identify the file for review.
- **Message:** Optional. Users enter a brief description in the text field to help approvers identify the changes that have been made.
- **Send Copy to Email:** Sends an email to the approver's external email address in addition to the internal OU Campus message received in the approver's workflow Inbox.
- **Submit Button**: Click to send the content to the approver.



Sending for Approval

Both pages and binary files can utilize the approval workflow.

1. Navigate to the **Pages** list view by selecting **Content > Pages** from global navigation bar. Additionally, expanding the **File Navigation** sidebar displays a list of the available pages.
2. Select a page from the **Pages** list view and hover over the row. Choose **Submit For Approval** from the **Publish** menu.
   Additionally, clicking the linked file name from the **File Navigation** sidebar will display a view that includes the **Page Actions** toolbar. From the toolbar, click the arrow on the **Publish** button to reveal additional publishing options including **Submit For Approval**.



3. Select the user from the drop-down next to the **To** field. If an approver has been enforced, the **To** field is auto-populated, and there will not be a drop-down available.
4. Fill out the necessary text fields.
5. Optionally, select **Send External Email** to allow the request for review to be sent to the user's external email address. This allows the user to receive an indication that action is to be completed without having to log into OU Campus. Clearing this option will only send the message through the OU Campus system.
6. Click **Submit**.

For more information about approving content:

Approving

New Content

New Content Overview

Content can created and managed within the Pages list view of the CMS. By navigating to **Content > Pages**, a user with the proper authority may create new pages, sections, folders, and other types of content. The system is configured with templates, which are utilized to create new sections and pages. These templates allow for the pages to be configured uniformly and have a consistent look and feel. The available templates depend upon the structure created by the administrators. For more information about setting up templates, please see:

Templates

The templates available for creating new content are dependent upon the implementation and the access settings as configured. Templates are specific to the institution, and examples given may vary from new page to new page, as well as from institution to institution. Note that the template choices below are examples and may not be the same template options offered by the institution, and do not include every conceivable template. Also, different sets of templates may be available in different folders.

New Folder vs New Section

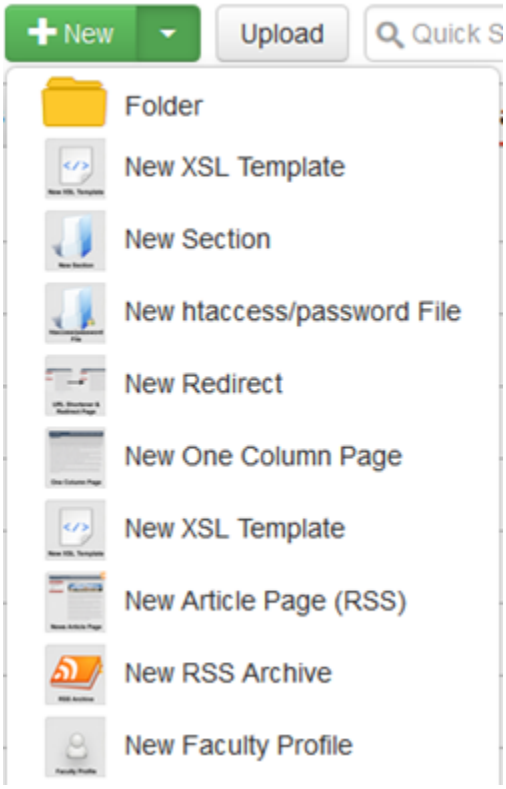
The difference between creating a new folder and creating a new section is that when creating a new section the template can be configured to create new pages as well. The basic New folder tool generally should not be used to create new directories that will contain web pages, as the support files are not created when selecting the New Folder checkbox. This will lead to error message as the supporting pages needed by the XSLs will not be available. The most common use of the New Folder checkbox is when users need a directory to contain images, PDFs, Word docs, or other non-web page files. For this reason, it is generally recommended to use template groups to allow administrators to repress the ability to have empty folders created in directories, as often times users can become confused between the basic (built-in) New Folder tool and new section templates (which create folders and files).

Creating New Content

New pages and directories can be created by clicking the New button or the drop-down indicator next to New from within the folder structure.

Similar options are available between clicking the New button and clicking the drop-down indicator. Note that the option to create a folder is unavailable when the New button is used, and that the user is navigated away from the directory structure to a new screen.

Example of New Content Options from Drop-Down



Example of New Content Dialog

An implementation will typically include at a minimum:

- Create a **New Folder**. Folders are for binary files and are not the same as creating a new directory. A folder can be created to contain binary files, such as images and PDFs.
- Create a **New Section**. The New Section option creates a new content-based directory.
  The new section template will contain all of the necessary files to make the pages within the new directory render correctly.

  When creating a new section, navigate to the parent directory where the new section will be contained. If **New Section** does not appear, contact the administrator.

- Create a **New Page**. A new page can be created by clicking on the appropriate template for the type of page. Note that administrators can restrict the type of templates available for the directory, and that users may not have a choice in template type.

Creating a New Page

Creating a New Page Overview

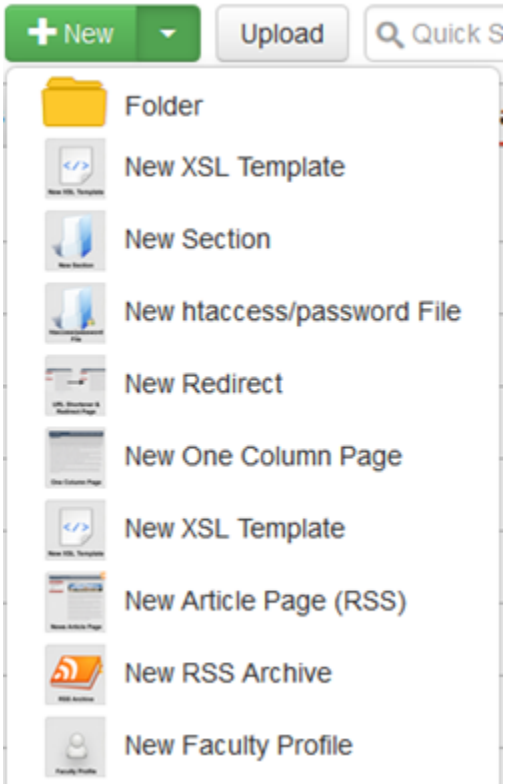
A new page can be created from existing templates within the OU Campus system by accessing the Pages list view. The Pages list view can be accessed by selecting **Content > Pages** from the global navigation bar. Pages should be created from within the appropriate directory. Not all users have the authority to create new pages, and users with authority to create new pages may have restricted access to the type of template that may be used. Users have access to the following screens during the new page creation process:

- **New Content**: Allows users to select a template to create new content.
- **New Page Template**: The new page templates may include templates that create pages with different layouts, such as for a one- or a two-column layout. A new page template usually includes the ability to add metadata and configure parameters for the page creation.

New Page Creation Options

A new page can be created from the Pages list view by using the New button.

Users can additionally click the drop-down indicator on the New button to display the available templates.



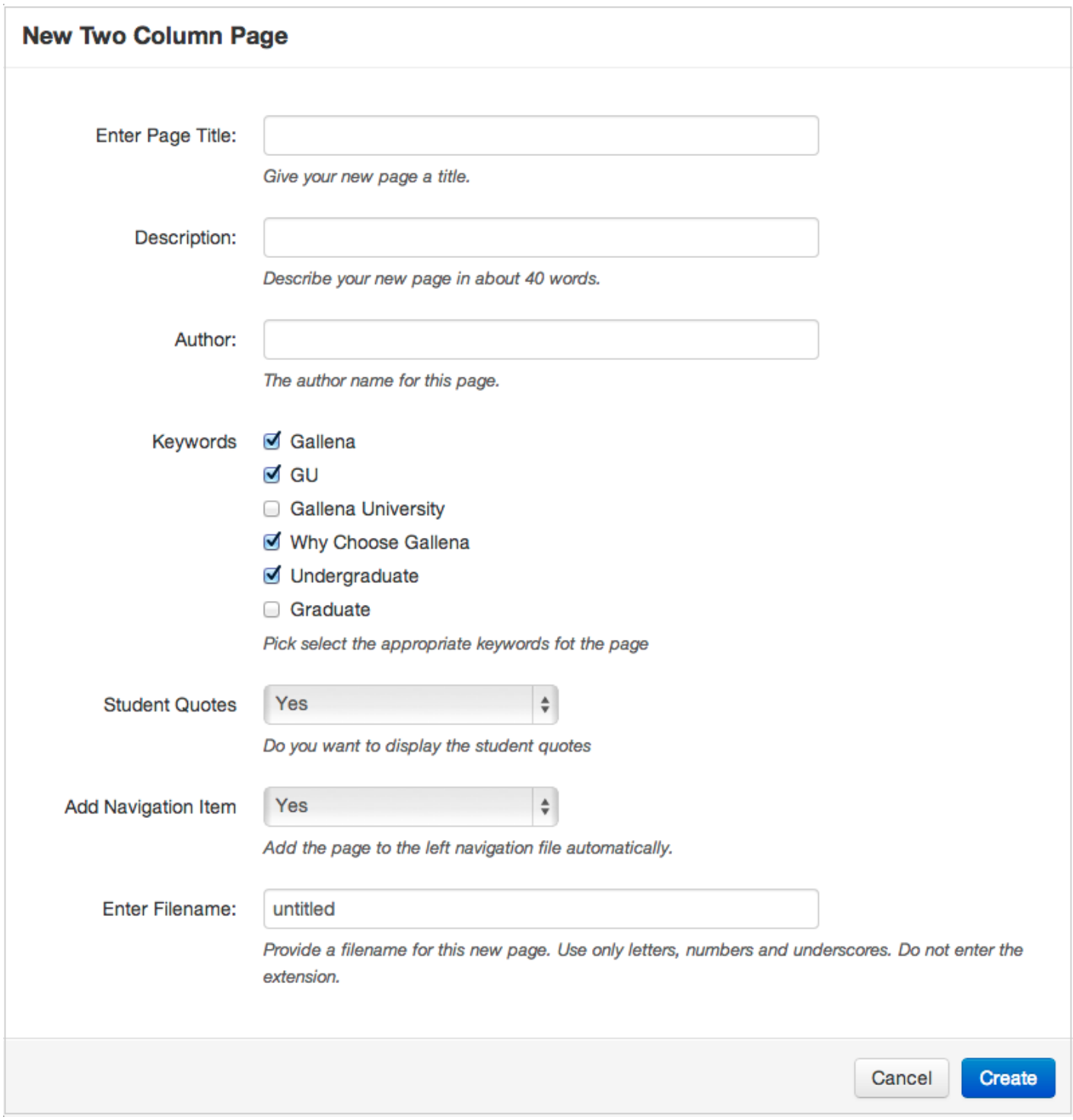
New Content Dialog

The templates available vary depending on access settings. Users click one of the templates to open the form-based editing for a new page using the selected template. The New Content dialog includes:

- **Template Icon**: Provides users a thumbnail icon, usually depicting the functionality of the template associated with the image.
- **Template Name**: Provides the name of the template (or the template's file name) as it appears in the OU Campus system.

New Page Wizard (Typical)

After users select the template to use for the new page creation process, a dialog displays. The options available on this screen are directly dependent on the options defined in the template design files and the XSL. Users fill out all necessary parameters in this dialog to create a basic page, usually without the content. The customized content is added by the user with the WYSIWYG Editor.



Creating a New Page

To create a new page in the OU Campus system:

1. Navigate to the **Pages** list view by selecting **Content > Pages** from the global navigation bar.
2. Click the **New** button, or use the drop-down menu.
3. Select the type of page to be created.
4. Fill out the **New Page** information in the displayed dialog.

5. When the information is completed, click **Create**.

Upload and Edit Image

Upload and Edit Image Overview

An image can be edited and uploaded from the Upload To dialog within the Pages list view of OU Campus.

Selecting and Uploading the Image

1. From the **Pages** list view, click the **Upload** button.
2. For **Upload Type**, choose **Upload** and **Edit Image**.
3. Select the image file from the local computer for uploading and editing.
4. This displays the **Edit Image** panel with the image.
5. After utilizing any necessary editing functionality, click **Upload** to upload the image.

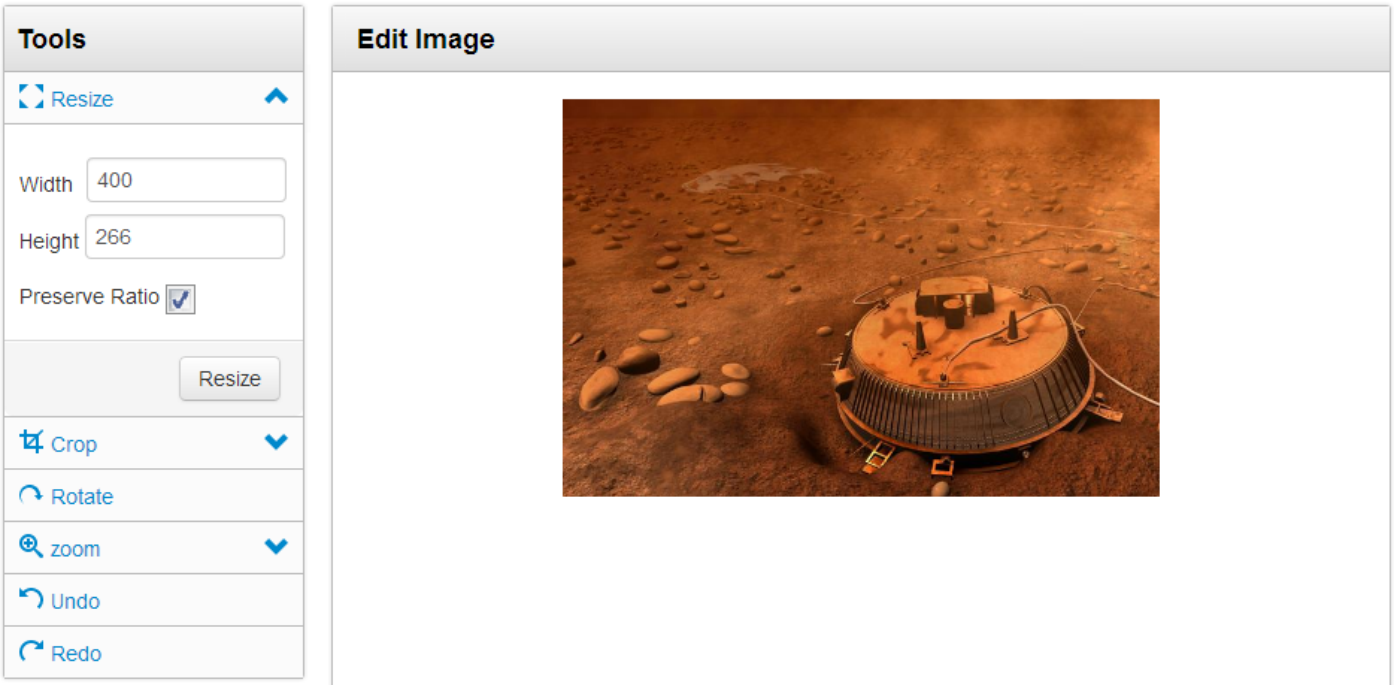
Editing the Image

The following functionality is available on the Tools menu:

- Resize
- Crop
- Rotate
- Zoom
- Undo
- Redo

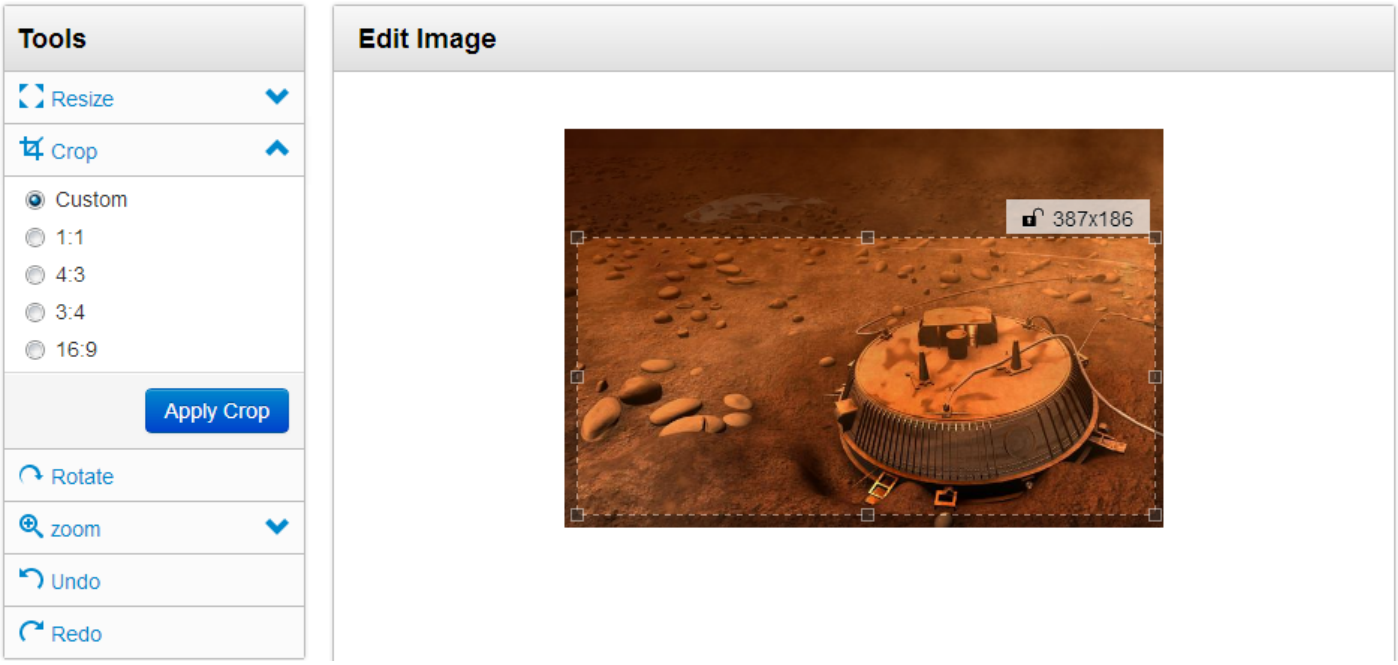
Resize

The Resize tool includes the ability to specify a new width and height for an image to upload. The original ratio for the dimensions of the width and height for can be kept intact by selecting the Preserver Ratio checkbox.



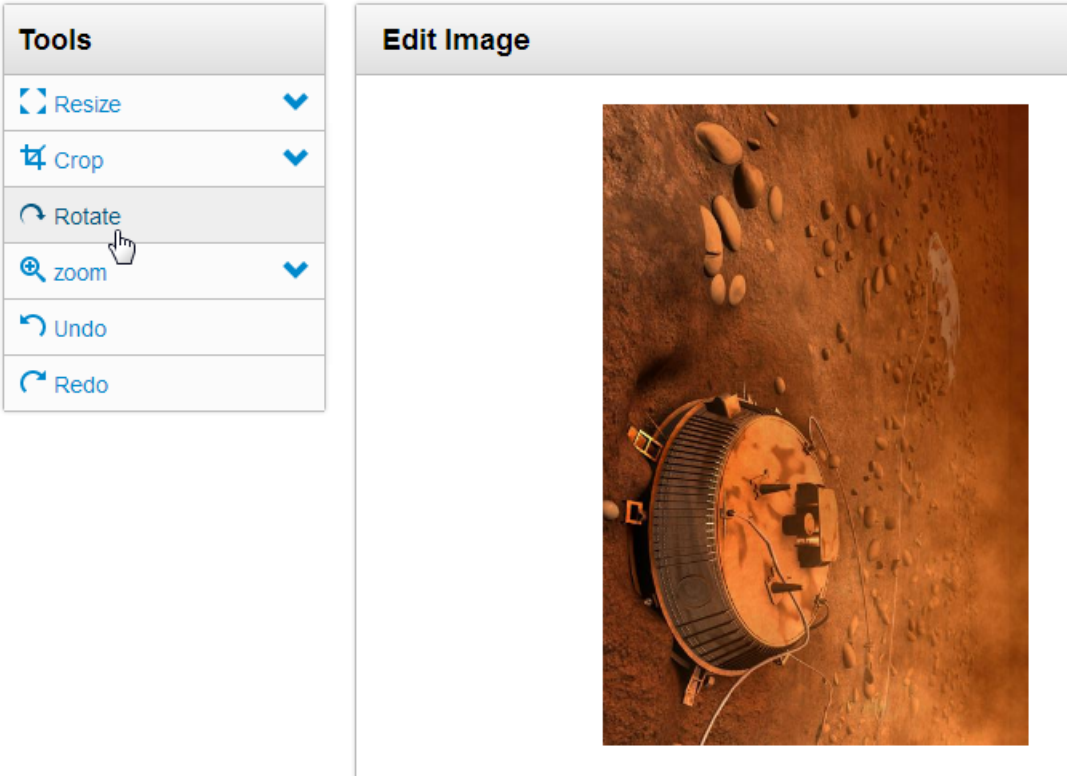
Crop (Custom)

The Crop tool can be used to reduce the dimensions of the image by either selecting a ratio or by determining a custom crop size by manipulating the crop box by dragging the crop handles located on the edges of the crop box.



Rotate

The Rotate tool rotates the image (edited and unedited) 45 degrees in a clockwise direction with each click.

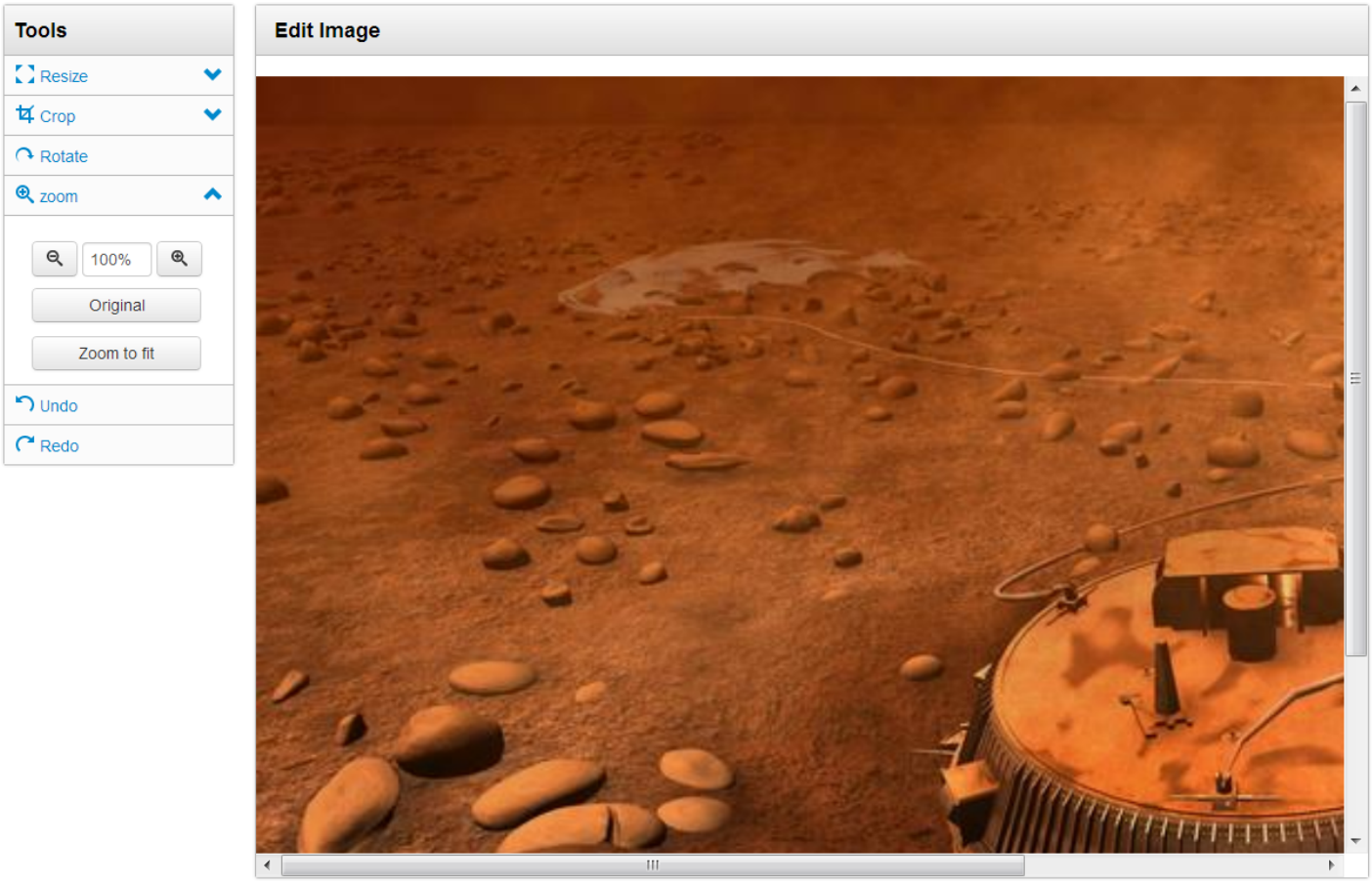


Zoom

The Zoom tool can be used to manually enter a percentage of the original image size to be displayed in the Edit Image panel for editing. The plus and minus magnifying glass buttons may also be used to increase or decrease the viewing size.

The Original button reverts the image to the original size.

The Zoom to Fit button resizes the image to fit into the panel for viewing.



Undo/Redo

The Undo and Redo functionality is available after performing another editing function.

Creating Assets

Creating Assets Overview

The basic steps for creating an asset are the same for all assets types. Inherently, levels 4 through 10 have the ability to create a new asset and this can be modified with various access settings. Depending upon the asset type being created the available fields and options vary. Once an asset has been created, it will be available for inserting onto a page via the WYSIWYG Editor or Source Editor in accordance with any access settings that may be configured. Click the New button to create a new asset. The following panels are available:

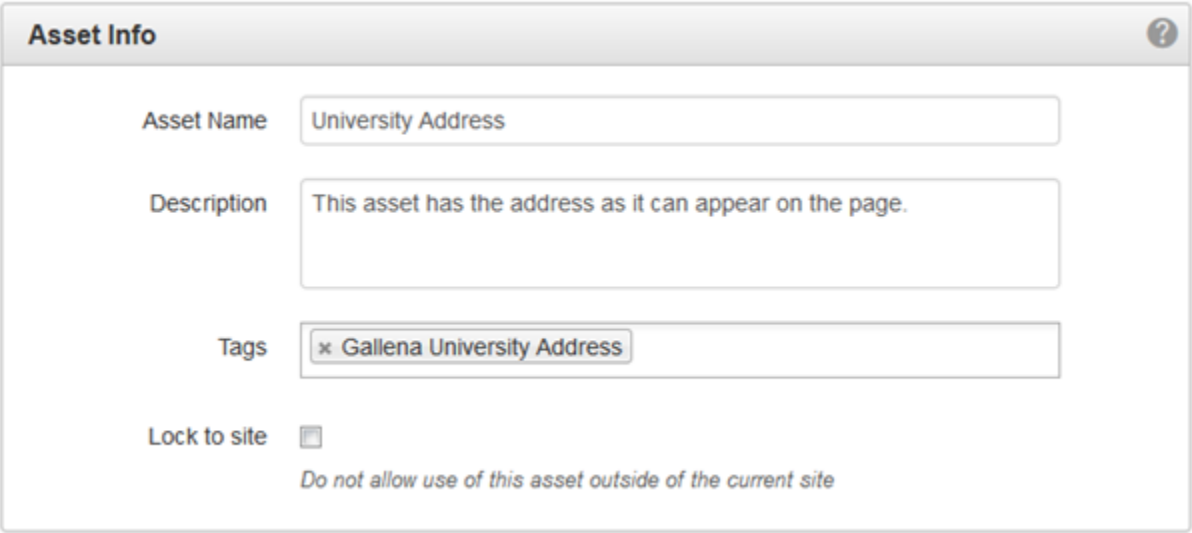
- **Asset Info**: Configures basic metadata properties.
- **Access Settings**: Allows for the initial initial group assignment to be made for editing and using the asset. Approver/workflow access settings can be configured after creation.
- **Asset Content**: Allows users to create the content within the asset.

LDP is an optional set of features in OU Campus that require specific configuration by an administrator. Please contact the university's designated OmniUpdate Sales Director for details. The Forms and Image Gallery assets are not available on the New menu unless Live Delivery Platform has been purchased and activated both at the account level and the site level.

Asset Info Panel

The Asset Info panel allows users to configure basic metadata properties of an asset. The following are displayed in the Asset Info panel:

- **Asset Name**: Friendly name that will be displayed through the whole system.
- **Description**: The description can also be useful as it is shown when selecting an assets from the Asset Browser when hovering over an asset.
- **Tags**: Tags can be added during asset creation or editing. Tags can be utilized by users to filter a list of assets.
- **Lock to Site**: Select the checkbox to disallow use of the asset outside of the site. Forms assets are locked to site by default. In other words, assets are available to all sites within an account. If the asset should only be available to the site in which it was created, then select this checkbox.

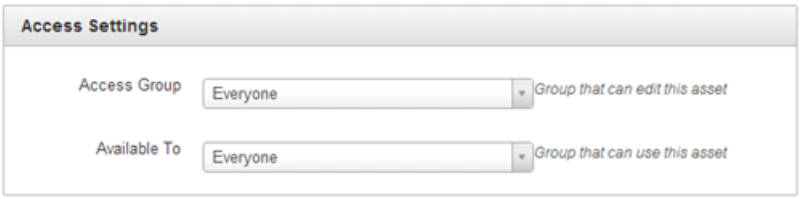


Access Settings Panel

The Access Settings panel allows users to configure the access settings for editing and using the asset. Available for levels 8 through 10. The Access Settings panel contains the following items:

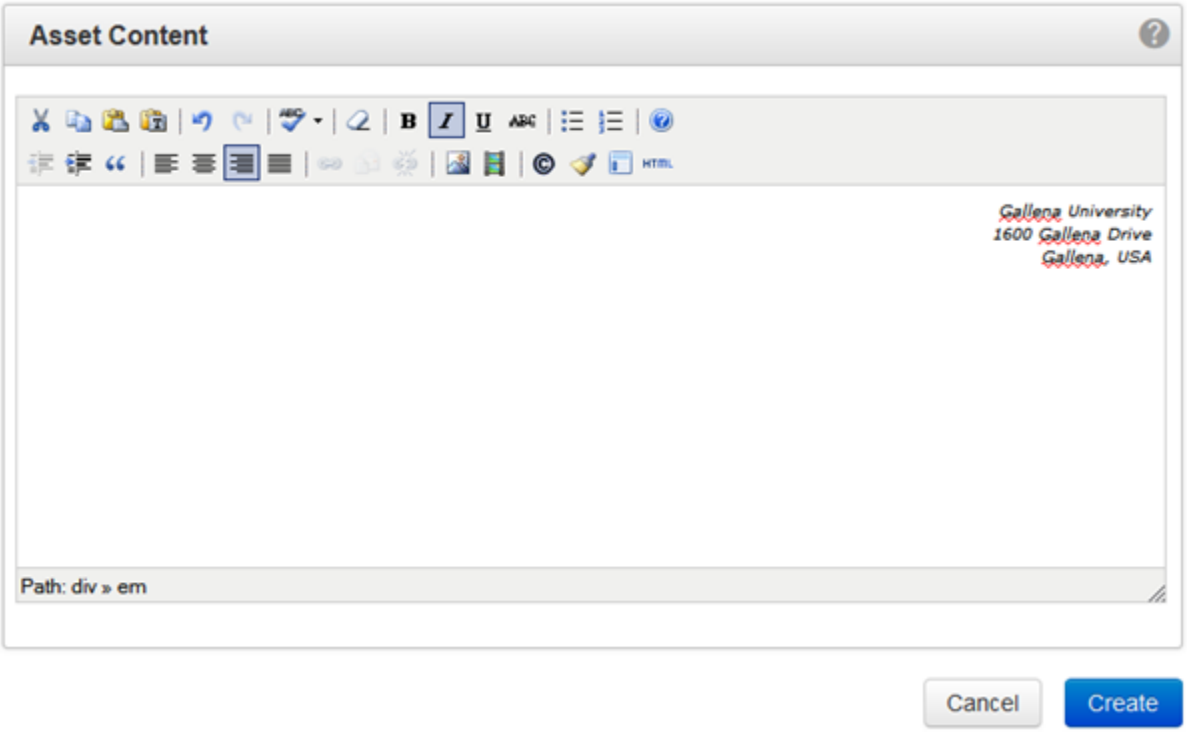
- **Access Group**: Assigns an access group to the asset. Everyone, the default, indicates that every user within the account can edit the asset from the Access screen.
- **Available To**: Assigns an access group whose members can use (insert on a page) the asset. Everyone, the default, indicates that every user within the account can insert the asset into a page via the WYSIWGY Editor or the Source Editor.

After the asset has been saved, the additional settings include Approver, Enforce Approver, and Bypass Approval, and those can be configured via the assets action view in the Properties menu.

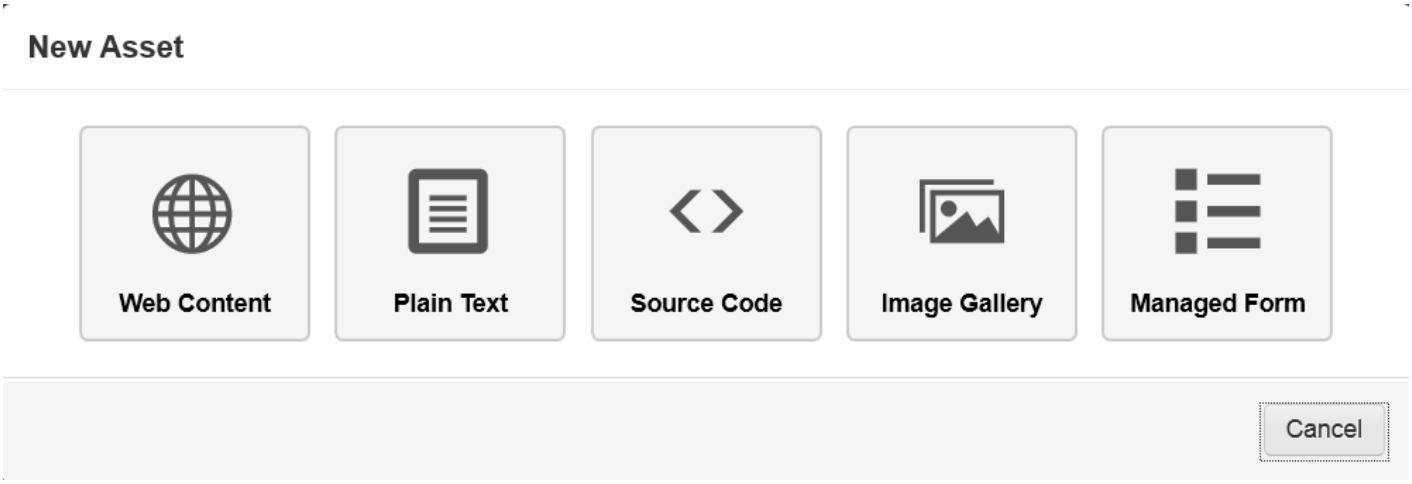


Asset Content Panel

The Asset Content panel is available for Web Content Assets, Source Code Assets, and Text Assets, and allows users to create the actual content of the asset. The available functionality of this panel depends upon asset type. Image Galleries and Forms do not have this panel displayed.



Creating a New Asset

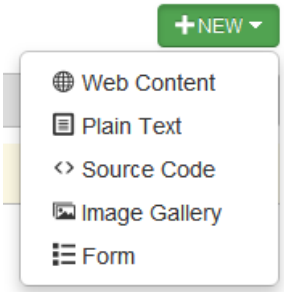


To create a new asset in the account:

1. Navigate to the Assets list view by selecting **Content > Assets** from the global navigation bar.

2. Click the **New** button or the down-arrow on the **New** button.

3. Select the asset type from the menu.



4. Configure the necessary settings.

5. Click **Create**.

6. **Publish** the asset. An asset must be published to the production server or publish target to update content on pages. An asset may be inserted on a page without publishing, but the content will not update the page on the web server. After using the asset on a page, the page must be published to update live version of the page.

Inserting Assets

Inserting Assets Overview

In order to insert an asset into a page or editable region, it must first be created within a site in the OU Campus system. For more information about creating assets:

Creating Assets

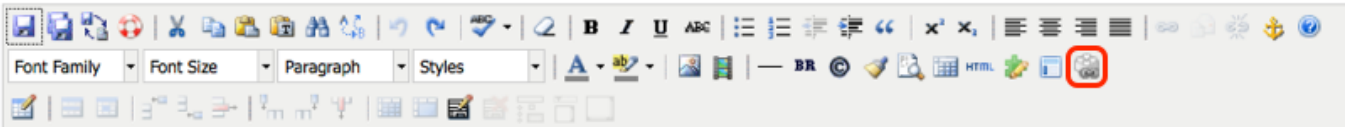
Once assets have created, content contributors can utilize assets. Assets are commonly inserted by one of the following methods:

- Using the WYSIWYG Editor
- Using an Asset only region
- Using the Source Editor

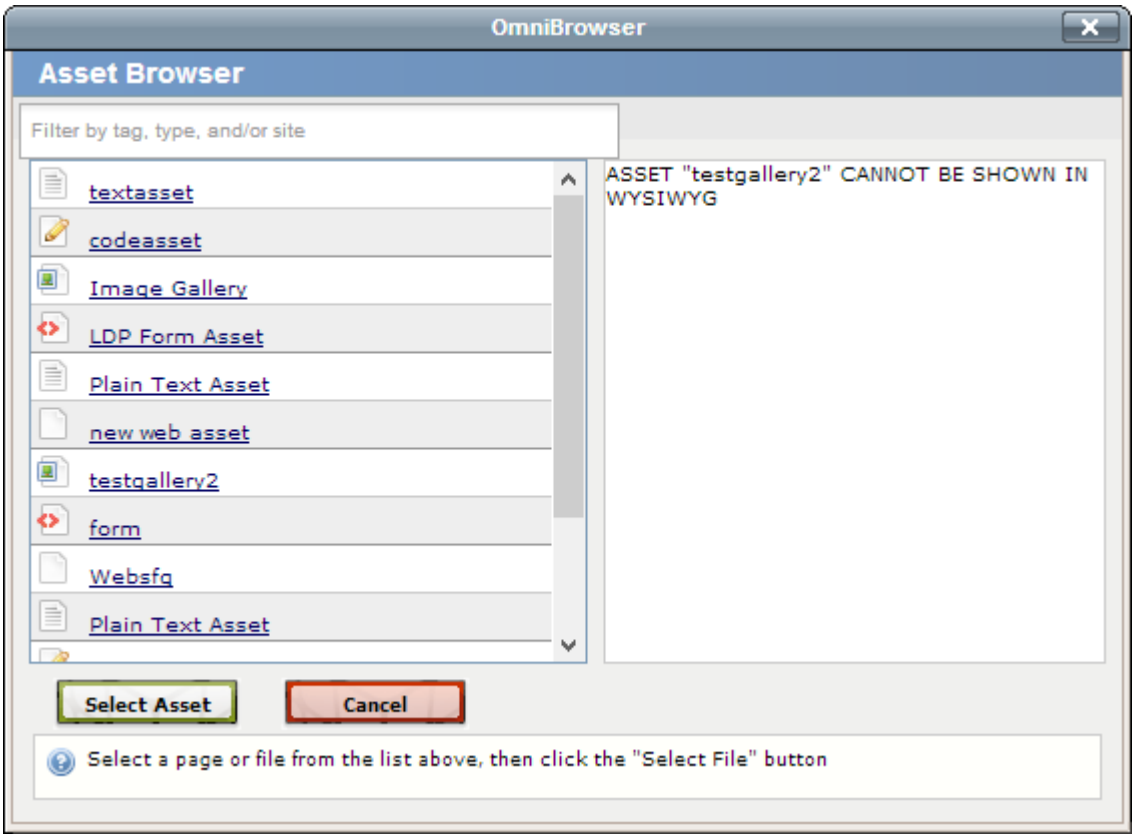
Inserting an Asset with the WYSIWYG Editor

Most often, an asset will be available to insert on a page while editing in the WYSIWYG Editor. Content editing might also be configured so that when clicking on an editable region button, the user is only presented with an asset chooser. Once a page has subscribed to the asset, any changes in the asset will update the page and republish it. The republishing of pages subscribed to assets can be throttled by administrators with the configuration of the publish threshold setting.

1. While in the **WYSIWYG Editor**, place the cursor where the asset will be entered.
2. Then find and click on the **Insert Asset** icon in the toolbar.



3. From the **Asset Browser**, choose the asset from the list of available assets. Optionally, a user can filter the list by tag, type, or site. Assets from all sites within an account are shown, unless otherwise restricted except for Managed Form Assets, which are site specific, are also only shown in the site in which they were created.



4. Click on **Select Asset**.

The asset will be entered into the page where the cursor was placed. If the asset is a Text Only Asset, or a Web Content Asset with no block level HTML code (such as p or div tags), the asset will preview with the content inside of a wrapper.

If the asset is a Web Content Asset with block level HTML code, a Source Code Asset, an Image Gallery Asset, or a Managed Form Asset, it cannot be previewed in the WYSIWYG Editor, but it will still have a wrapper. Note that even though the asset is not displayed in the WYSIWYG Editor, most will still render in the page preview. Source Code Assets will not always render with preview.

To delete an asset from a page in the WYSIWYG Editor, click anywhere on the asset wrapping and press the Delete key.

Inserting an Asset Only Region

An administrator may also create a template file that displays an editable region which forces users to use an asset chooser.

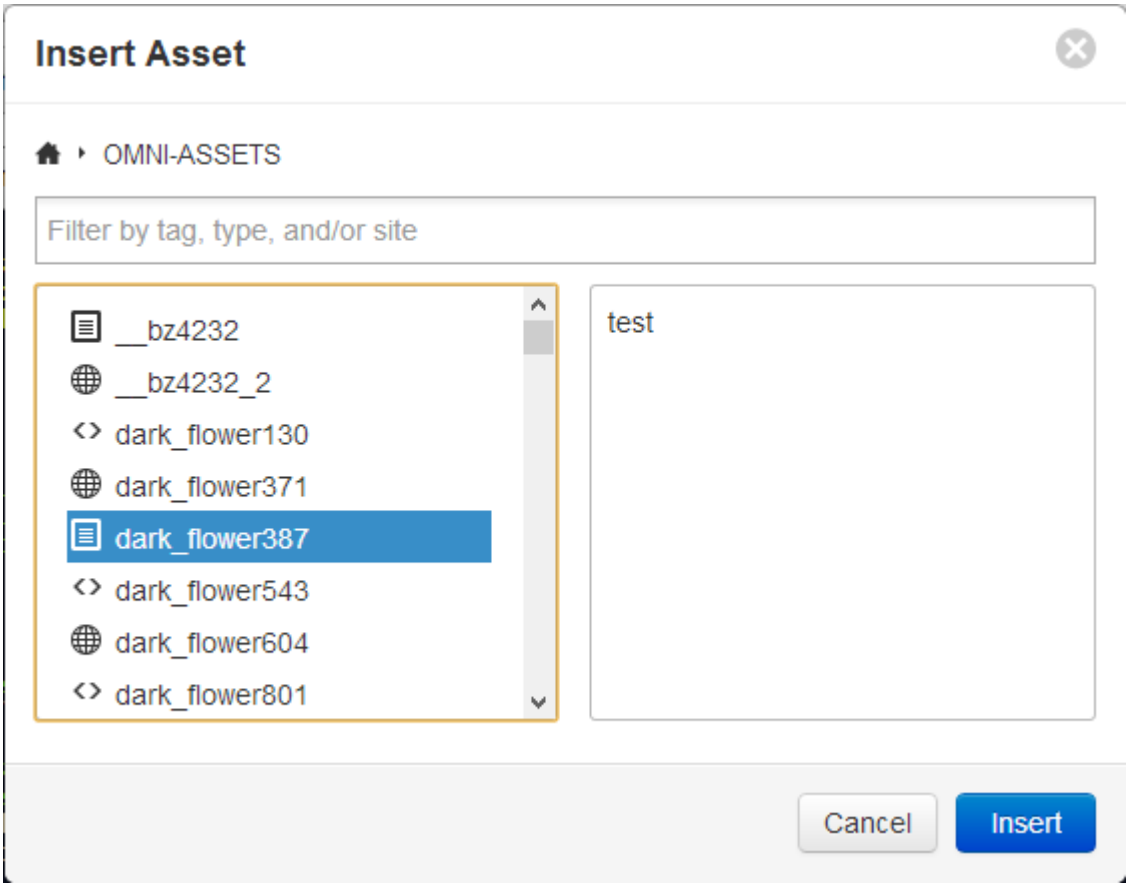
1. Click on **Choose an Asset** when creating a new page or in the MultiEdit screen, or simply the **Edit** button in an editable region.
2. Search for the desired asset using the filter options. Assets from all sites will appear, except for Managed Form Assets, which are site specific.
3. Select the desired asset.
4. Click **Select**.

Inserting an Asset with the Source Editor

A user can add an asset to a page or editable region using multiple methods including the Source Editor. It is important to remember that only Level 10 and Level 9 administrators have access to the Source Editor in the OU Campus system. However, lower level users can have access to the Source Editor as well as long as an administrator has enabled this functionality for the user's account in their permission settings.

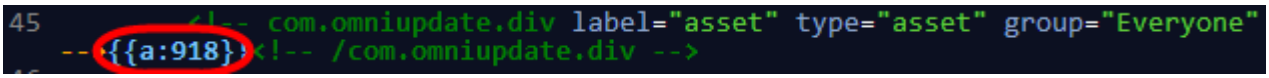
1. Navigate to the pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the row for the target page and select **Edit** from the list of available actions.
2. While in the **Source Editor**, place the cursor where the asset will be entered. Then click **Insert** from the available toolbar.

3. After clicking the icon, the **Insert Asset** dialog is displayed.



The **Insert Asset** dialog contains a list of the available assets along with a preview of the asset's content. The available list can be filtered by tag, type, or site.

4. Select the asset to be used.
5. Click **Insert**. The asset tag is entered into the source code where the cursor was placed.

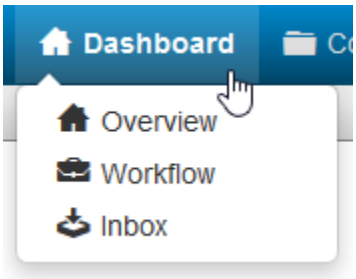


Assets in source code follow the syntax **{{a:###}}**, where the ### denotes the asset number. If an asset number that does not exist is entered, the asset does not render.

Dashboard

Overview

The OU Campus Dashboard provides a location within the CMS where each individual user can access user-specific messaging and gadgets. The Dashboard is the default log-in location from the standard OU Campus Login screen when not utilizing DirectEdit.

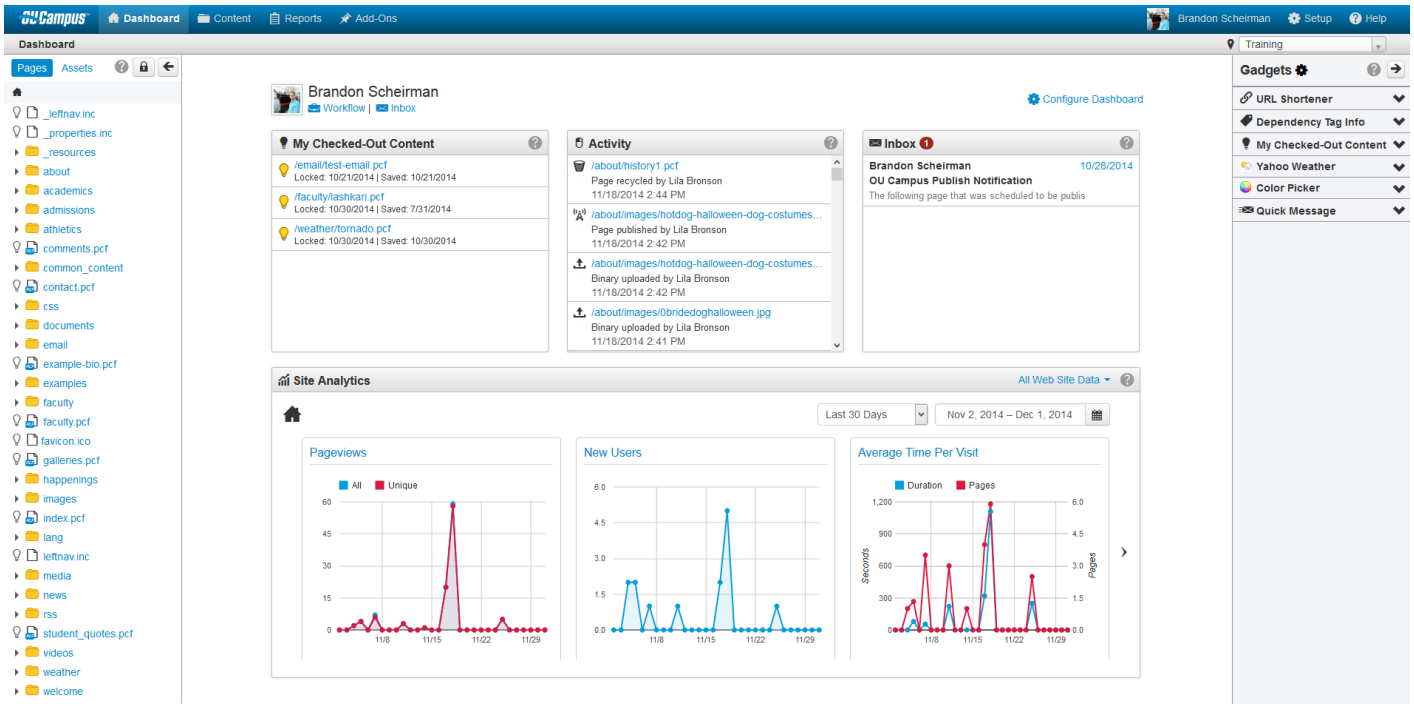


In the Dashboard menu on the Global Navigation bar, users can find links to Workflow and Inbox. These options are also found
beneath the user's name

on the Dashboard overview page.

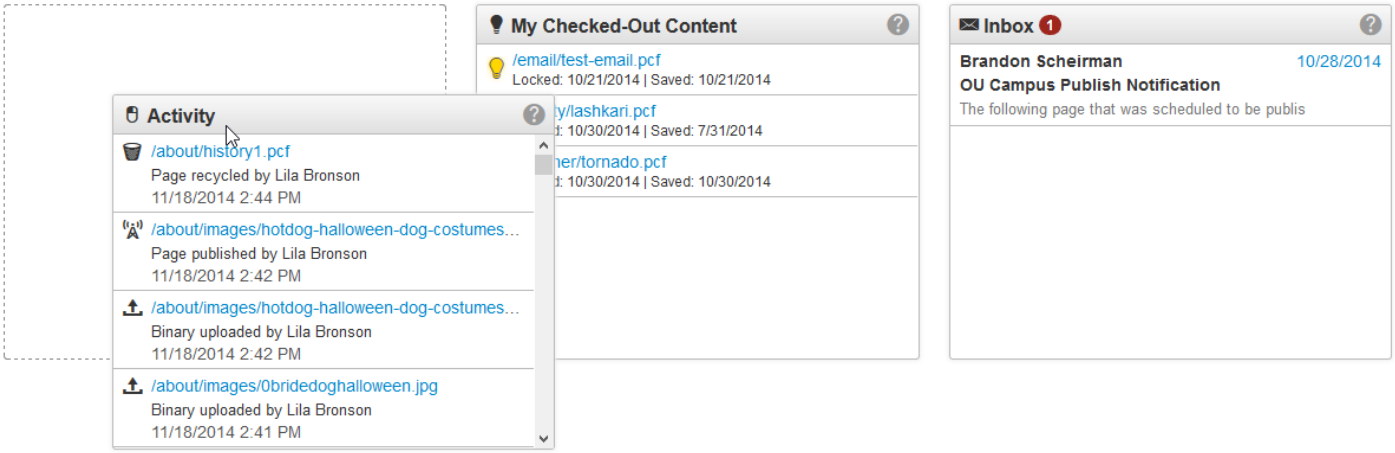
The Dashboard can be customized by each individual user by choosing which gadgets to show or hide in the view. A level 10 administrator can add gadgets to the system, and then make them available using group access controls.

Example Dashboard with Gadgets and Sidebars Expanded



Dragging Dashboard Gadgets

Gadgets can also be reordered on the Dashboard by clicking and dragging the grey title bar to a new "tile," shown by a dotted line.



There are three options on the Dashboard menu in the Global Navigation bar:

Overview

Clicking Overview takes users to the Dashboard overview page (seen above). Simply clicking the Dashboard link in the Global Navigation bar will take users to the same location.

Workflow

The Workflow list view shows content that a user has sent to another user for approval or content that has been sent to the current user for approval. These messages are separate from other messages (which

can be viewed in Inbox and Sent). Content moving through an approval process can be tracked using this screen.

For more information, visit the

Workflow page.

Inbox

Inbox displays messages from other users as well as automated messages associated with scheduled actions, such as a notification of scheduled publish or notification of page expiration. The Inbox Gadget is also shown on the Dashboard and includes how many new messages are in the inbox. The Inbox includes a linked list of messages and the functionality to compose a message.

For more information, visit the Inbox page.

Additionally, the Dashboard itself includes more functionality:

Configure Dashboard

Configure Dashboard can be used by each individual user to choose which gadgets to show in the main content area. For more information, visit the Configure Dashboard page.

Gadgets

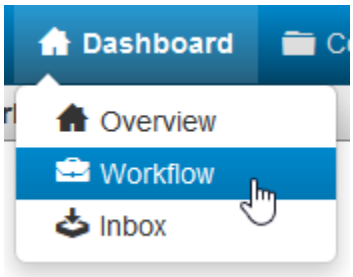
Frequently displayed gadgets include Inbox for messaging, site analytics, and a list of content that is currently checked out by the user.

For more information, visit the Gadgets page.

Workflow

Overview

Workflow is a component of the Mailbox that allows users to track content that has been sent for review through the approval process. The Workflow list view shows content that the current user has submitted to another user or received from another user. Additionally, content that has passed through or completed a workflow process (such as when content was approved and published, the request was declined, or canceled) is also shown in this view.



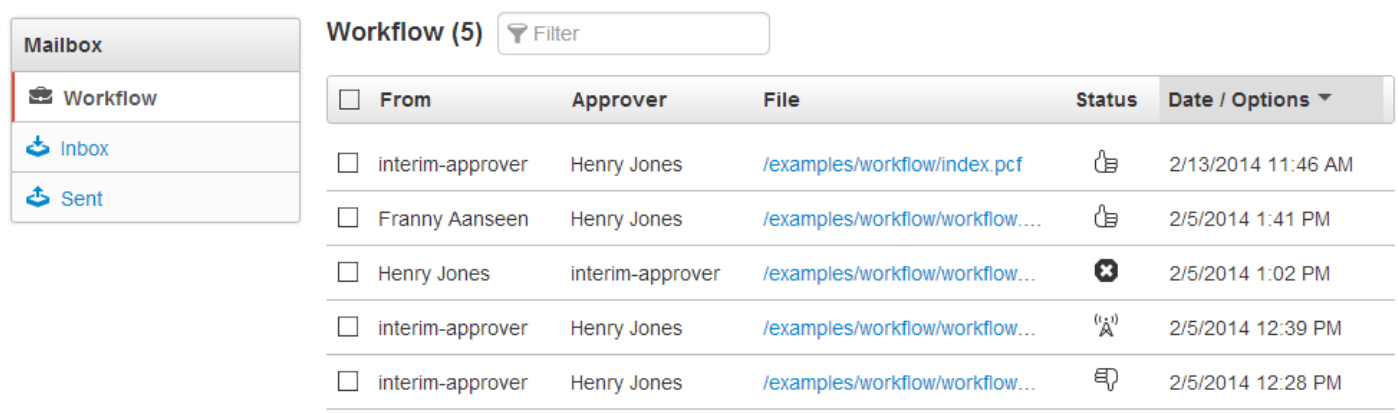
Workflow can be found in the Global Navigation Bar at **Dashboard > Workflow** or by clicking the Workflow link near the user's name on the Dashboard page.

When an administrator configures access settings for a page, users editing the page may be required to submit their changes to an approver in order for the content to be published. When this is the case, the **Publish** button on the page will be replaced with the **Submit** button. Users can include a message to the approver along with the submission. These messages, along with a link to the content, appear in the approver's Workflow list view.

General messages unrelated to approvals that are sent to the user's account will not be found on the Approval page. They are available in the Inbox.

Level 9 and Level 10 administrators may view the Pending Approvals report to view all content in workflow across all users.

Workflow Screen



The Workflow screen includes the following features and functionality:

- The number of items in the Workflow
- Filter tool to narrow down visible results in the list view
- Selection checkboxes to select and delete multiple messages at a time, or to view a single workflow message
- Sortable columns in the list view. Messages can be sorted by From, Approver, File, Status, or Date
- The linked file name which can be clicked to preview the content
- Status icons indicated where the page is in the workflow process
- The date and time that the content was sent for approval

File

The approver can click the linked file name to preview the content. Content that is sent to an approver is automatically checked out to that user and the user can perform various actions on the content, including decline and revert. For example, if the content is an image, clicking the link in Workflow will bring up the Image Editor. If the content is a page, the preview of the page is shown. Please note that Level 0 Reviewers cannot edit files.

Status

A status icon is shown in the Status column for each content item. Content listed in Workflow can be previewed by any user, but only the user to whom the content was sent has the file checked out and can perform other actions upon it. Clicking a status icons shows the Workflow Message.

Status Icon	Description
	Pending Approval (by another user)
	Pending Approval (by the current user)
	Approved and Published
	Declined
	Cancelled from Workflow

View

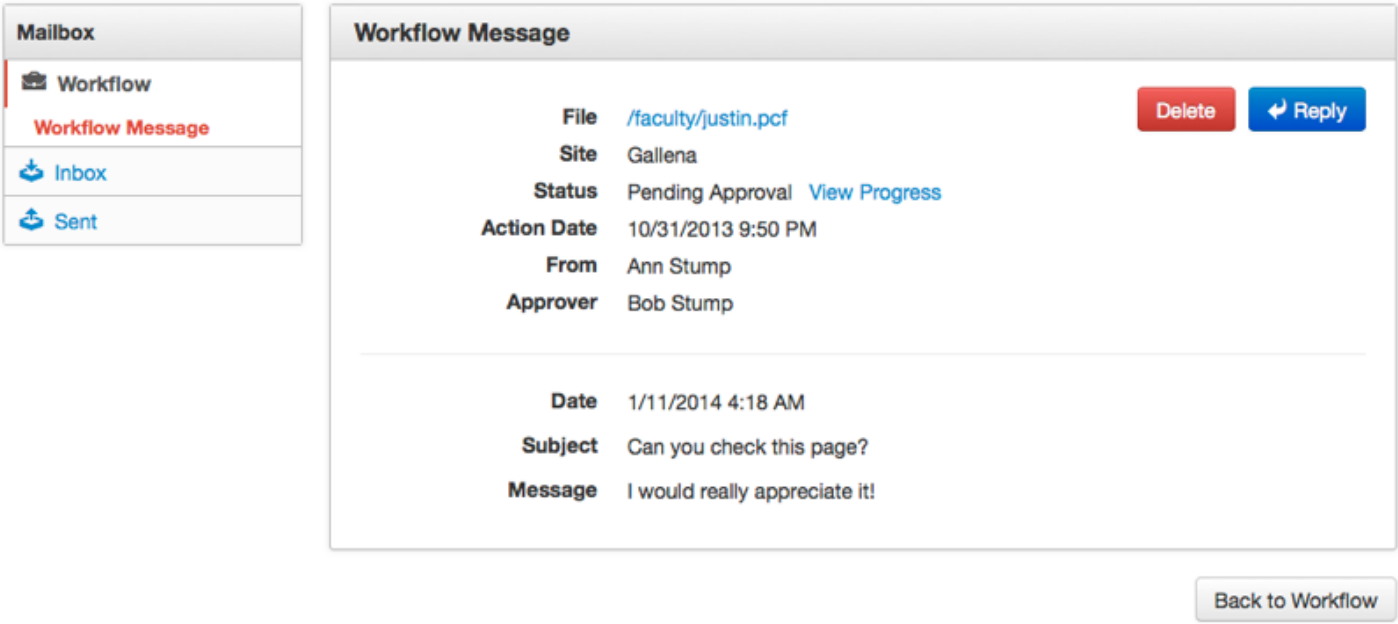
When content is sent for approval, the sender can attach a message. This is associated with the item in Workflow as a Workflow Message, which can be viewed by performing one of the following actions:

- Hovering over the file row and clicking on the View option
- Clicking the Status icon
- Selecting the checkbox next to the item and clicking View

From within the message, users can:

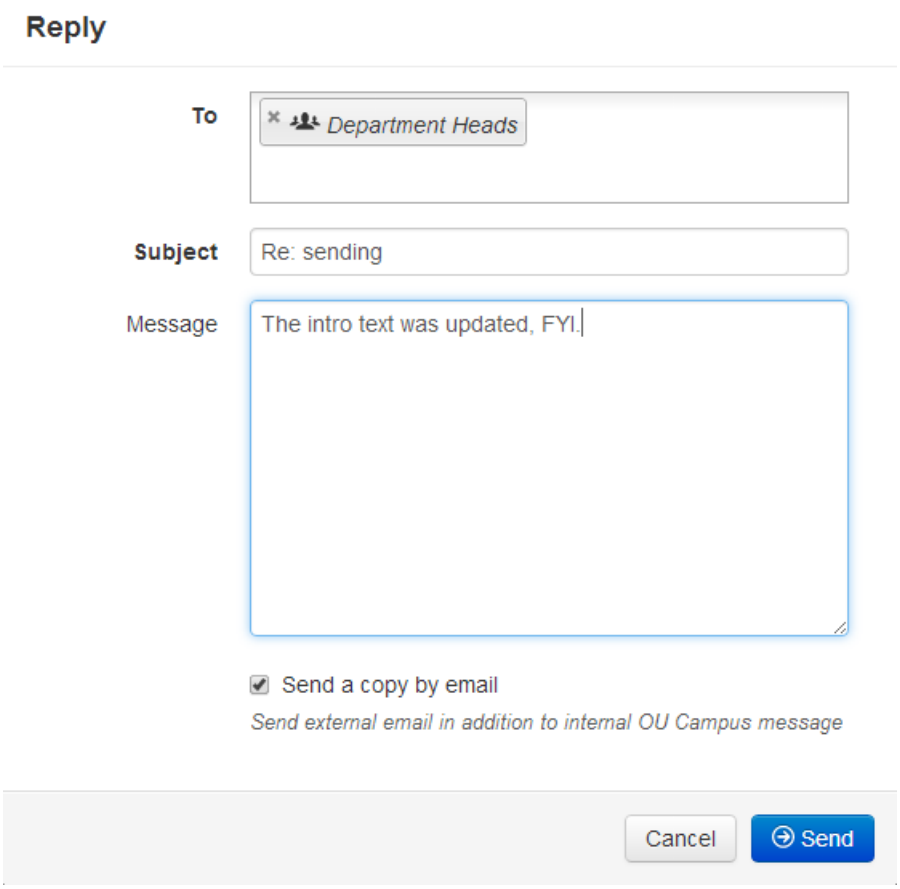
- Click the linked file to preview the content sent for approval
- View the workflow details, including the site from which the content originated, the status, the date of the latest action indicated by status (e.g., if the content has only been sent for approval but not approved, this shows the sent date, once published this shows the publish date), and who sent the content and

the approver. This also shows the message's details: i.e., the date and time the message was sent, the subject, and the message (if any).
- Delete the message
- Reply to the message
- Navigate back to Workflow



Reply

Users can reply to workflow messages by clicking the Reply button in the message. The Reply dialog is shown. Additional users or groups can be added to the message, the subject can be changed, and a message can be added. Optionally, a copy of the message can be sent by email in addition to the internal OU Campus message.



Clicking Send will send the message to the designated users and/or groups and will return the user to the original Workflow message. Clicking Cancel returns the user to the original Workflow message without sending a reply.

Delete

Workflow items can be deleted with one of the following actions:

- Hovering over the file row and clicking Delete
- Clicking Delete in the Workflow Message view
- Selecting the checkbox next to the item or multiple items and clicking Delete

Inbox

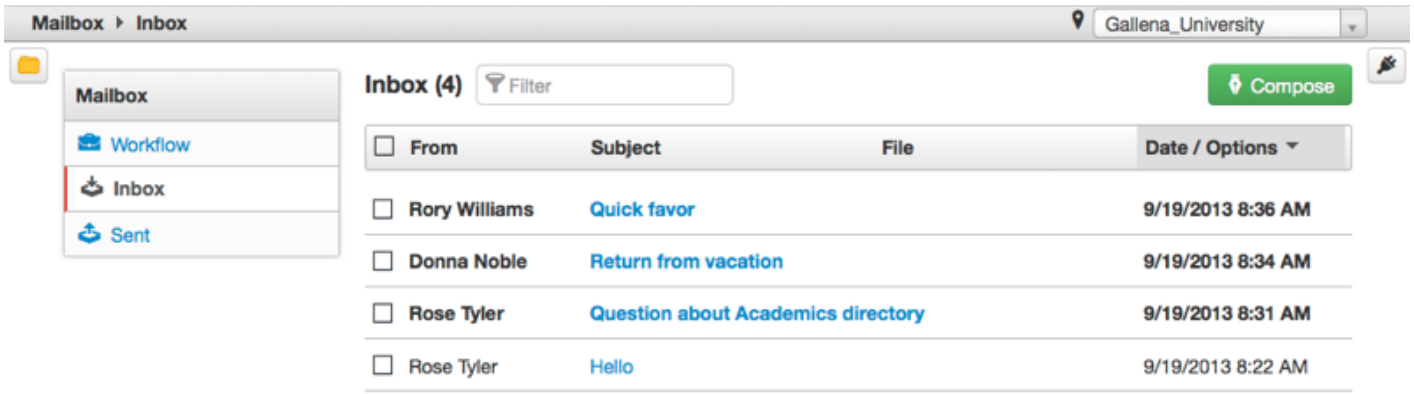
Overview

OU Campus has an internal messaging system that allows users to send messages to other users and groups of users. These messages can be attached to requests for approval as part of the Workflow process, or they can be sent to users without associating them with a page. All messages can have a copy sent to a user's email address in addition to being sent internally in OU Campus.

All workflow-related messages reside in a separate section of the Mailbox. For more information, visit the Workflow page.

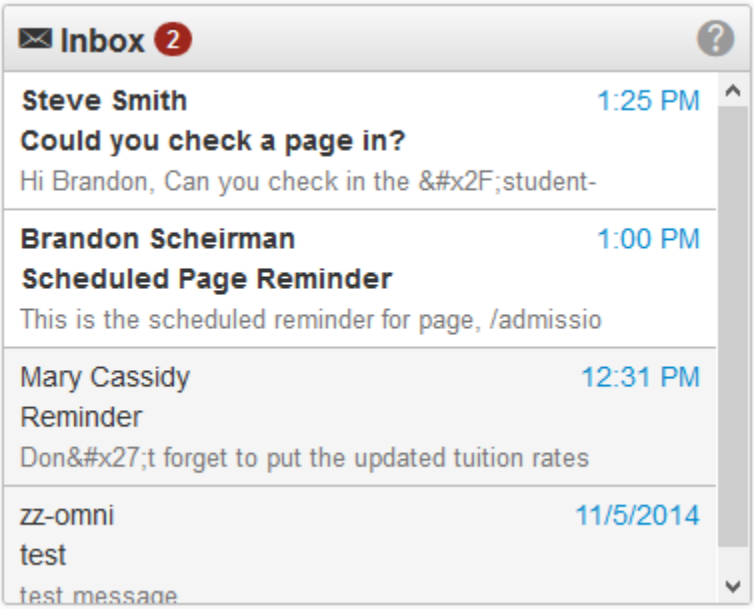
All other messages reside in the Inbox section, with the ability to compose, reply, forward, and delete messages, as well as view sent messages in the Sent section.

Inbox



The Inbox is similar to a standard email inbox.
Users can navigate to the Inbox from the Dashboard menu in the Global Navigation bar or by clicking the link to the Inbox on the Dashboard itself.

Inbox messages can be also be previewed from the Dashboard through the Inbox Gadget.
Clicking a message in the gadget will take users to the message in the normal Inbox interface.

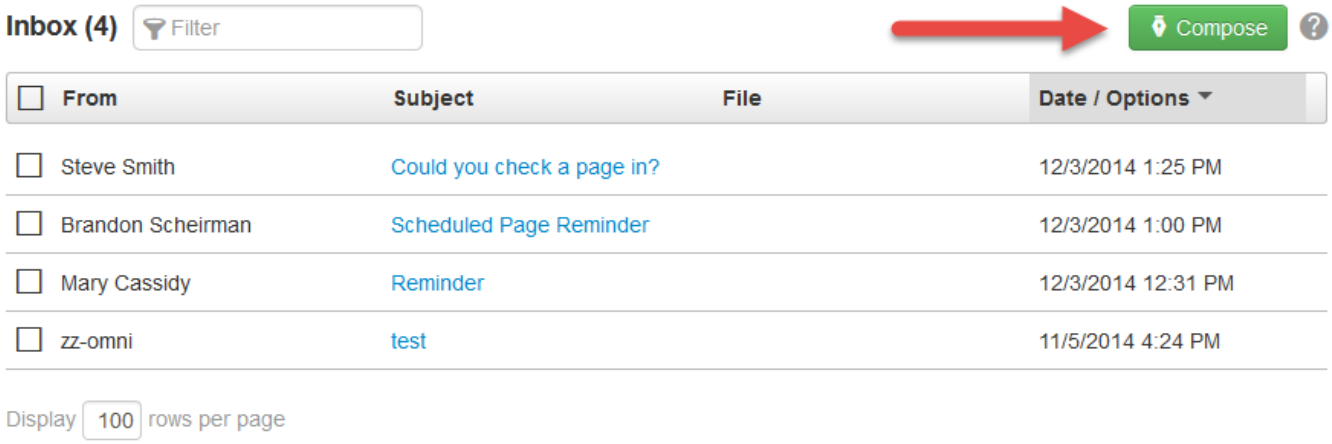


Composing Messages

Compose is found in the Inbox and in the Sent box. By default, the Send a Copy by Email checkbox is selected. This will send an email with the composed message to the recipient's external email account, as long as the user receiving the message has an email address on file. If no email address is on file, it will only send the message within OU Campus.

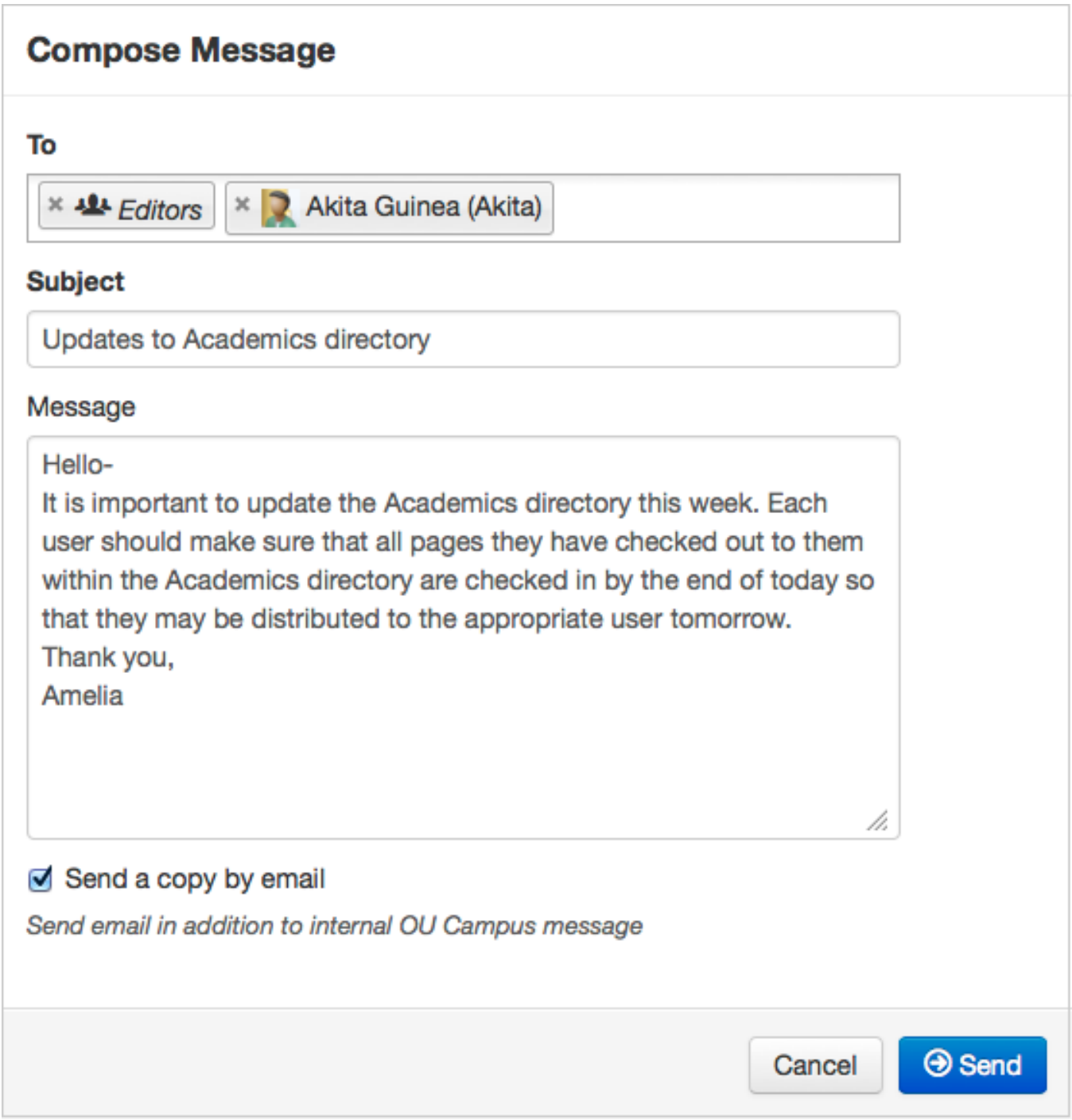
To compose a message:

1. Navigate to the **Inbox** or **Sent** box.
2. Click on the **Compose** button, found in the top right of either screen.



3. A modal will appear. Enter the user to whom the message should be sent in the

   To
   field. A user or a group of users may be selected from the drop-down, which appears when the user clicks into the field.



4. Enter a

   Subject
   and

   Message
   .
5. By default, the

   Send a copy by email

checkbox is selected. To only send the message within OU Campus, uncheck this checkbox.

6. When the message is complete, click

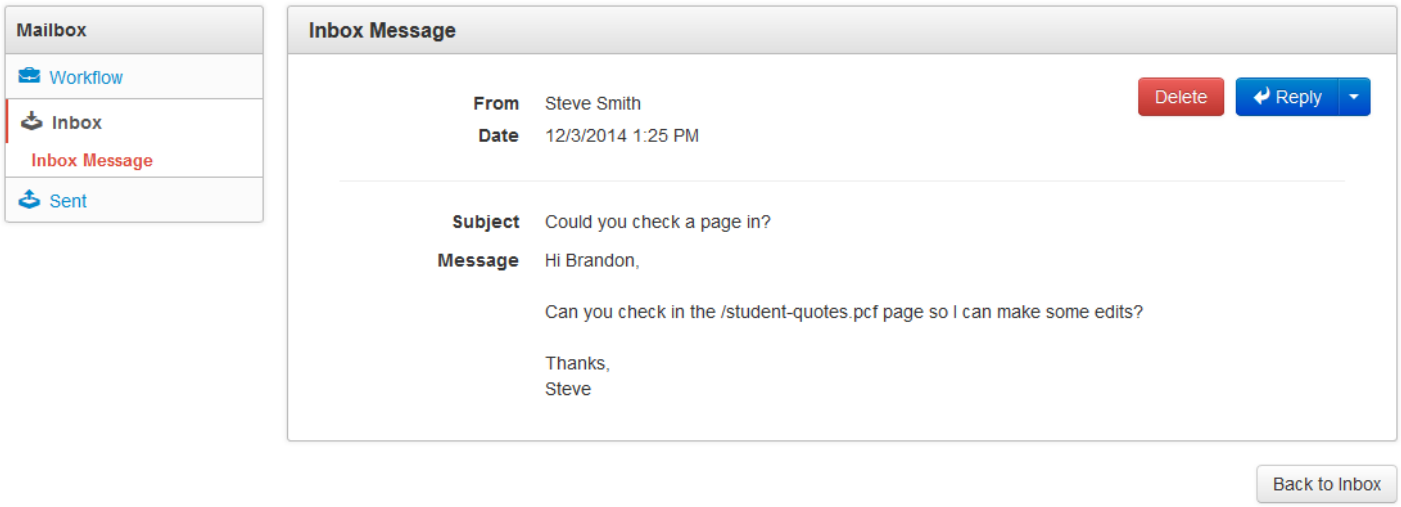
   Send

   .

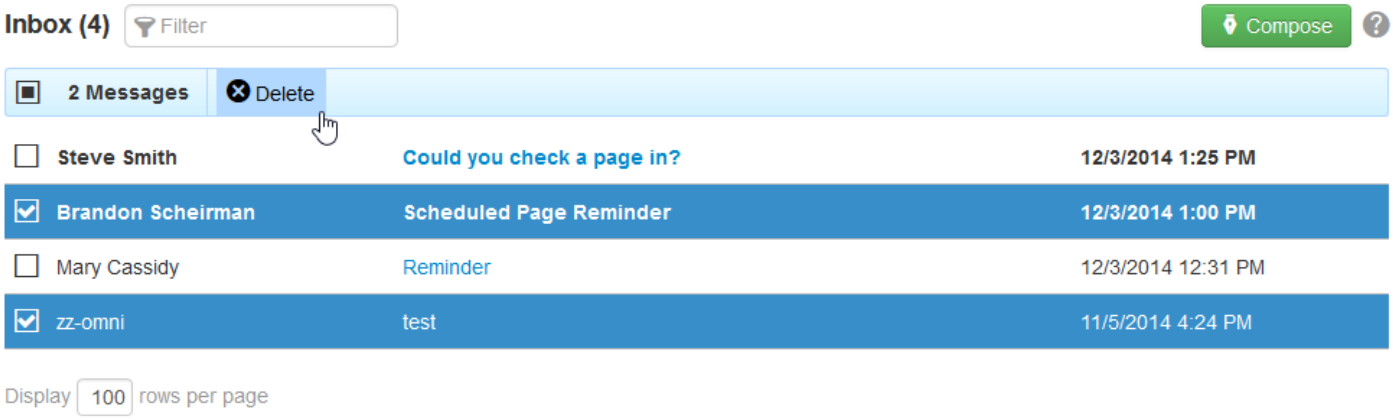
Viewing, Replying to, and Deleting Messages

To view a message on the Inbox screen, hover over the message row and click View, or click the hyperlinked message subject. From the gadget, click anywhere on the desired message to enter the message view in the Inbox screen.

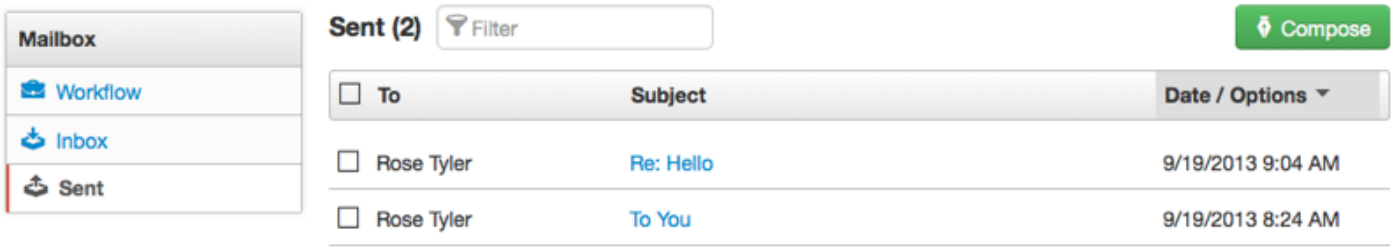
Use the blue Reply button to reply to the message, or use the drop-down indicator next to the Reply button to forward the message to another user. A user can return to the Inbox without responding to or deleting the message by clicking the Back to Inbox button or the Inbox button in the local navigation bar on the left.



A message may be deleted by using the red Delete button inside of the message, or by hovering over the message row in the Inbox list view and clicking Delete. Multiple messages may be deleted by selecting the checkbox next to each message and clicking the Delete icon that appears in the top row.



Sent



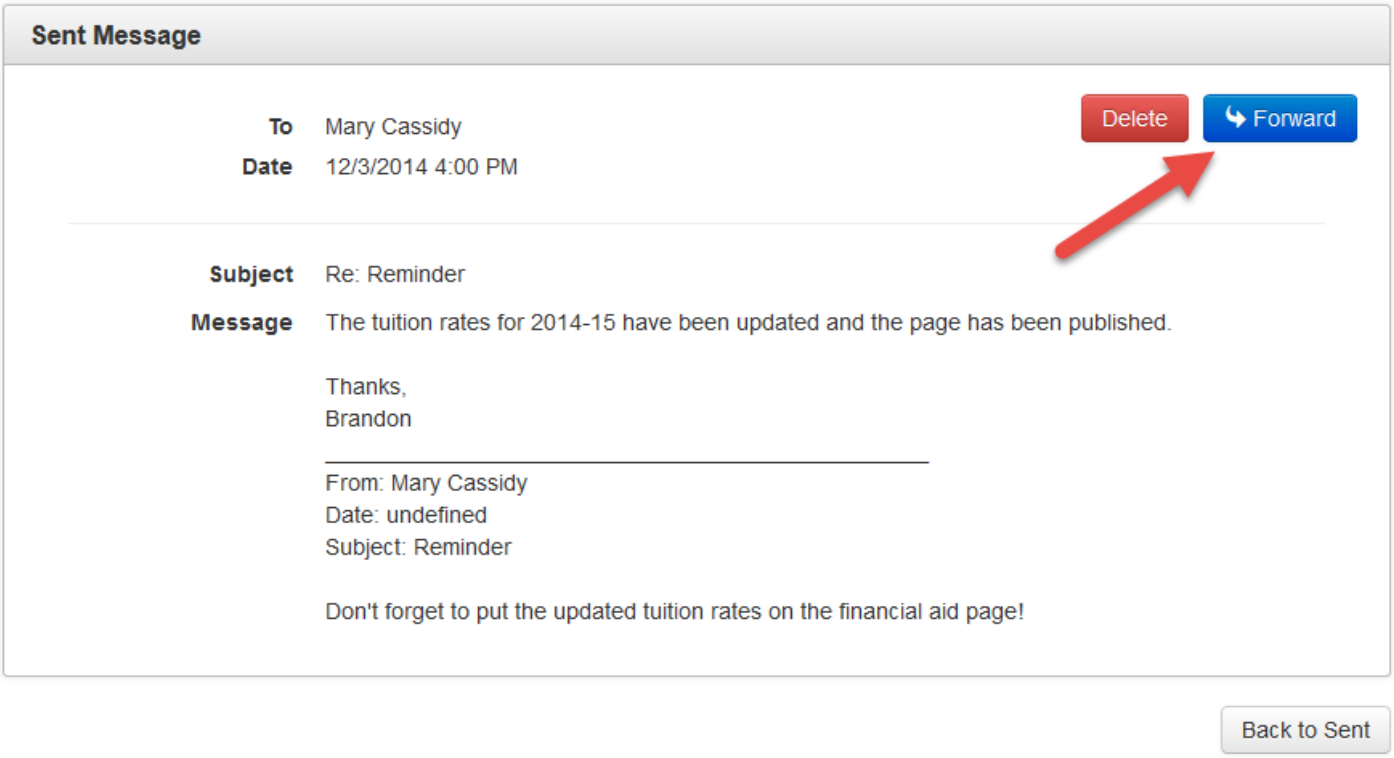
The Sent list view shows messages that the user has sent and messages that were sent in association with scheduled publishes, reminders, and the workflow process. If a message that has been sent to the user is replied to or forwarded, then that is also shown on the Sent screen.

Other functionality available from the Sent screen includes:

- A list of the number of sent messages
- A filter tool to narrow results by the recipient or the subject
- A Compose button to immediately compose a new message
- Columns that are sortable by recipient, subject, or date
- Multi-select checkboxes to delete multiple messages at one time
- The ability to review, reply, forward, and delete messages from the Sent view
- Items that can be hovered over in the list view, allowing users to view or delete individual messages

Forwarding a Message

Users can forward previously sent messages to other users and groups.



To forward a message:

1. From the **Sent** screen, Click the **Subject** column of the desired message. Alternatively, hover over the message and click **View**.
2. Click **Forward** in the top right and fill in the **To** field with the desired recipients. Modify the **Subject** and **Message** fields as necessary.
3. By default, a copy will be sent via external email. If the user does not have an external email associated with their account, then the message is only sent within the CMS.
4. Click **Send**.

Gadgets

Overview

A gadget is a little program that provides additional functionality or streamlined access to functionality within OU Campus. Gadgets are available account-wide and can be either a system gadget or a custom-created gadget. System gadgets are included with the CMS. Gadgets customized for an institution are also integrated into the implementation. Gadgets may also be created after the initial implementation and added to the system. In any event, gadget access may be limited by group assignment and members of the group (and administrators) will have access to that particular gadget. Some gadgets are only located on the Dashboard or on the Gadgets sidebar, while others are available in both locations.

Each individual user can choose which gadgets to show or hide on their Dashboard or Gadgets sidebar; some sidebar gadgets are only shown when within a specific editor as the operations performed there are specific only to page editing. These include the Images Gadget, Snippets Gadget, and Page Info gadget.

Administrator-created gadgets have access to the OU Campus API, so they can be programmed to do virtually anything a built-in tool can do, plus can additionally be scripted to access other external web services. Gadget files are created in a directory that consists of, at a minimum, an XML file to configure the appearance of the gadget, and a URL (i.e., index.html) that includes the program. The gadget code can include JavaScript, jQuery, HTML, and CSS, both in the form of imported files and within the page itself.

Custom-created gadget functionality includes but is by no means limited to:

- Bulk assigning a user to groups
- A chat client for in-system, real-time messaging
- A color picker that can be used to visually choose a color and then insert the hexadecimal equivalent into code
- Inserting an image from Flickr
- Sending an email from the Gadgets sidebar
- Quickly publishing a page
- Providing a user list
- Programmatically modifying PCF files
- Automating repetitive tasks

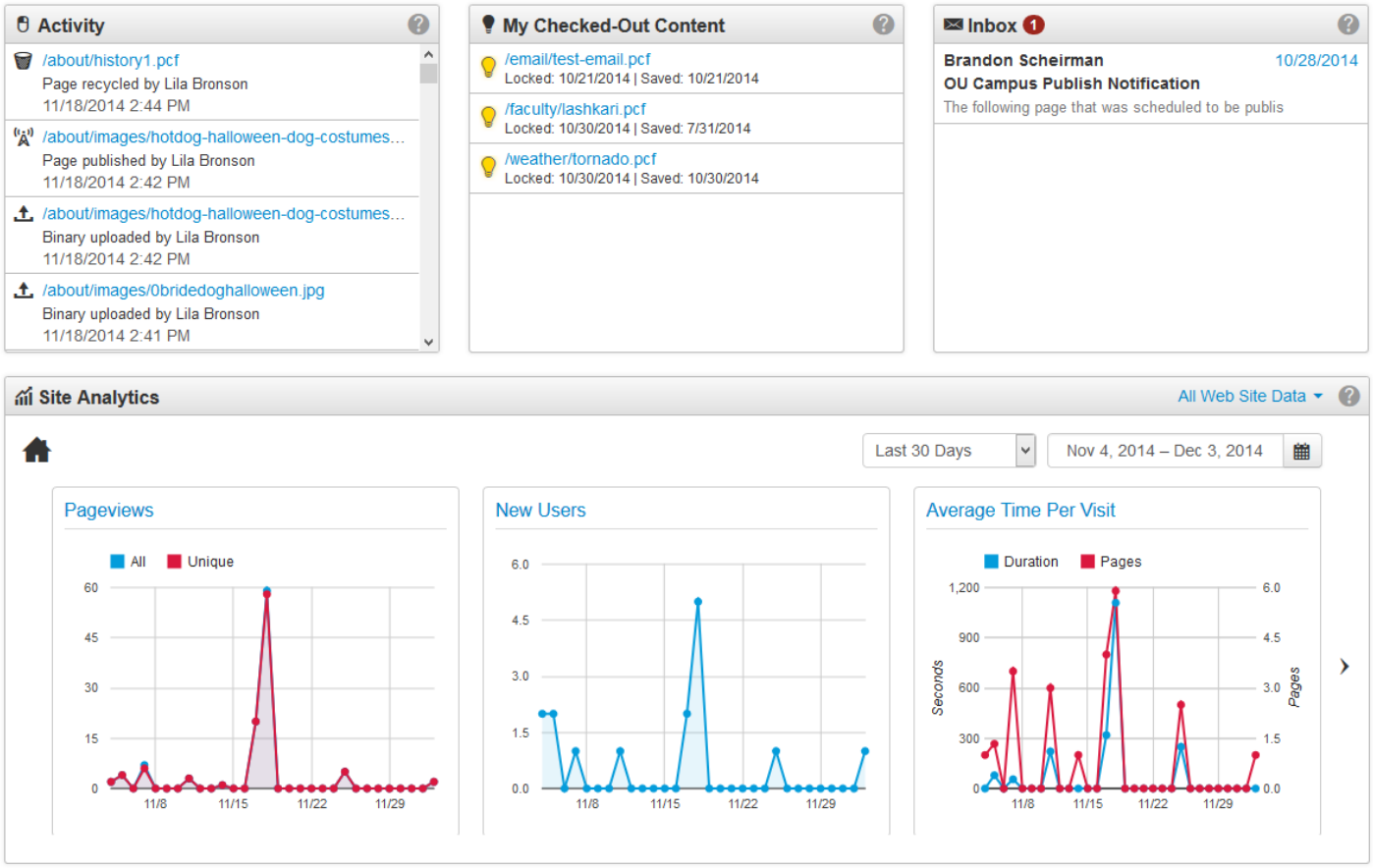
Gadget Configuration

Gadget access is controlled by a Level 10 administrator from the

Setup > Gadgets
screen. This screen allows the administrator to assign groups to each gadget, giving group members the ability to view and use the gadgets. In addition to being able to assign gadget access, an administrator can create new gadgets and configure gadget-specific properties.

For more information, visit the Gadgets Setup page.

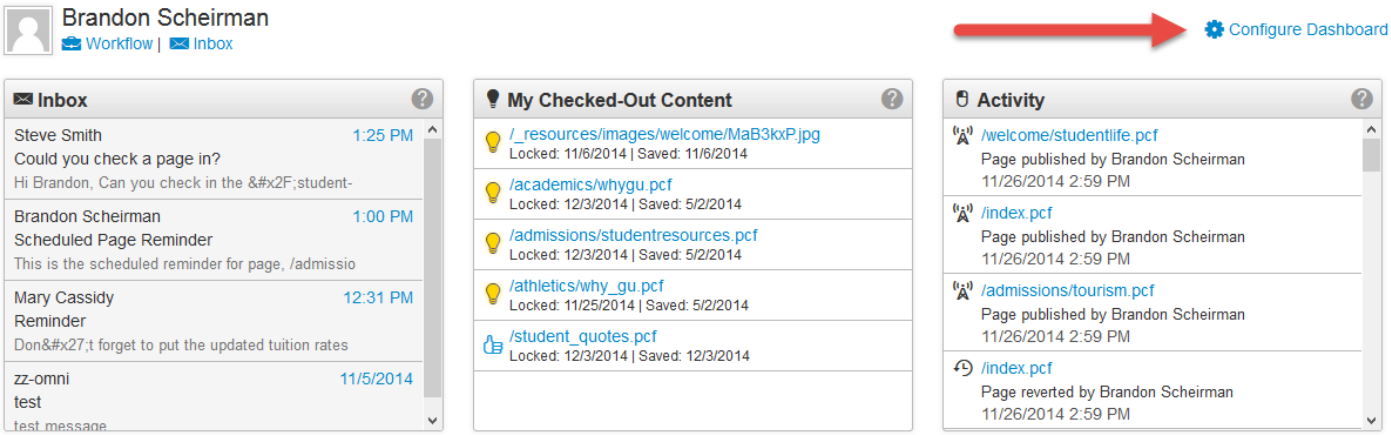
Dashboard Gadgets



Dashboard gadgets are generally gadgets that have site-wide functionality, such as site analytics or the Activity gadget. Others provide shortcuts to content, such as the Inbox or My Checked-Out Content. The system gadgets available on the Dashboard are as follows:

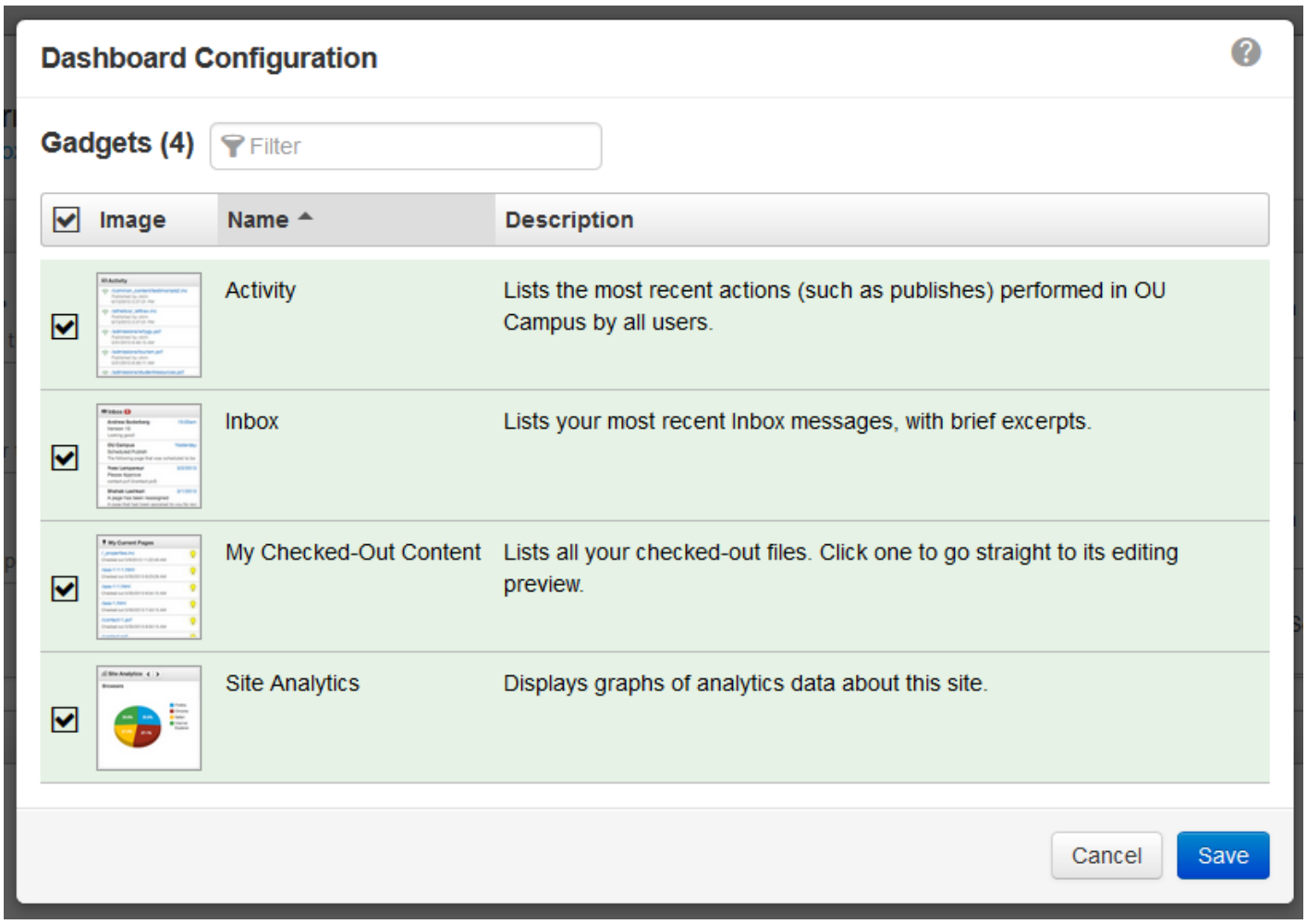
- Activity: Activity shows content with recently performed actions such as a scheduled publish, expire, or upload.
- My Checked-Out Content: Shows the content checked out by the current user and the date/time stamp that the content, which can be a page, asset, or file, was checked out. Within this gadget, the pages are linked and can be clicked to for editing or approving. The light bulb icon indicates the page is checked out and clicking the icon checks the page back in.
- Inbox: Provides a scrollable list of recently received messages.
- Site Analytics: Provides site-level analytics through Google Analytics directly inside OU Campus.

Configuring the Dashboard



The **Configure Dashboard** link can be used to choose which gadgets to display on the Dashboard. All users have access to this functionality, but not necessary all gadgets will be visible for all user levels, depending on access settings established by the administrator.

Clicking **Configure Dashboard** brings up the **Dashboard Configuration** modal.

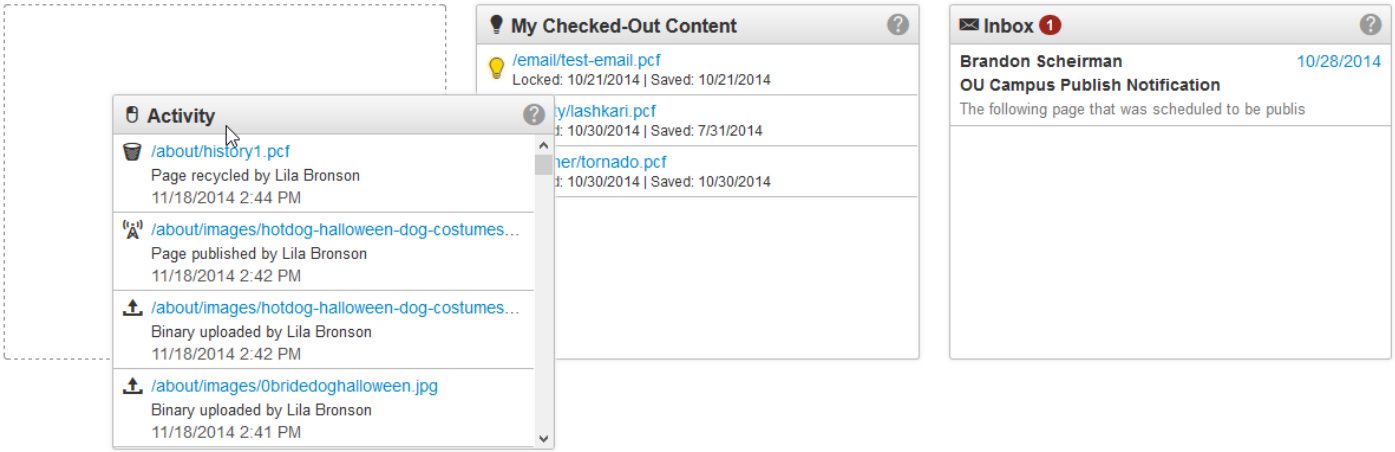


The Dashboard Configuration modal shows the Dashboard gadgets that are available to the user. Gadgets that are currently configured to be available on the Dashboard are listed and can be filtered by name. Functionality includes:

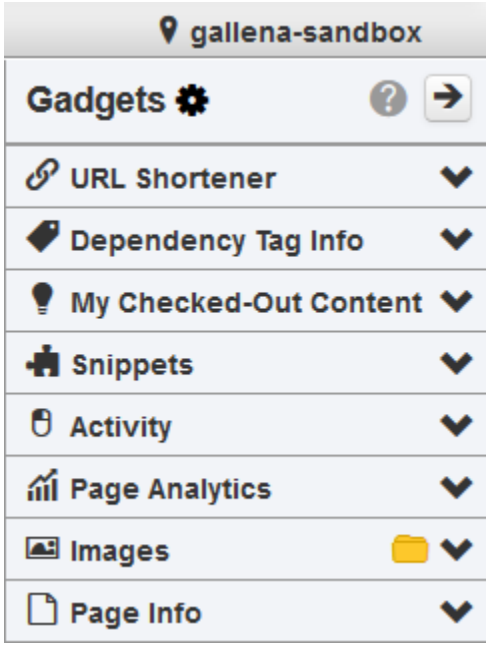
- **Filter**: Enter two or more characters to filter by gadget name.
- **Hide**: To hide a gadget from view on the Dashboard, click anywhere within the green gadget box or click the checkbox to clear the selection. A gadget configured to be hidden is shown in gray.
- **Show**: Click anywhere within the gadget box or the checkbox to select a gadget to show on the Dashboard. A gadget configured to be shown is shown in green.

Rearranging Dashboard Gadgets

Gadgets can also be reordered on the Dashboard by clicking and dragging the grey title bar to a new "tile," shown by a dotted line.



Gadgets Sidebar



The Gadgets sidebar is a global element that can be shown or hidden by the user. The sidebar exemplifies responsive design as the sidebar also automatically collapses or expands when a browser is resized. The Gadgets sidebar can be shown by clicking on the Show Gadgets button at the top right of the screen.

Once the Gadgets sidebar has been expanded, individual gadgets can be collapsed or expanded and the user can configure which gadgets appear in the sidebar. The gadgets that are available on the sidebar are dependent upon the implementation of the site and can be configured by a Level 10 administrator.

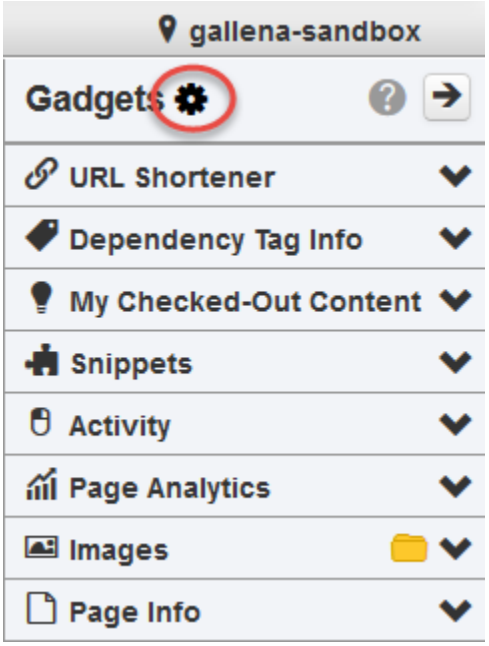
Gadget Sidebar Icon Reference

Icon	Name	Description
	Show Gadgets	Click the Gadgets icon to show the sidebar.
	Choose Gadget	Click to display the Choose Sidebar Gadgets modal from where it can be determined which gadgets to show on the sidebar.
	Hide Gadgets	Click the arrow to hide the sidebar.
	Expand a Gadget	Click to expand the view of the gadget on the sidebar.
	Collapse a Gadget	Click to collapse the view of the gadget on the sidebar.

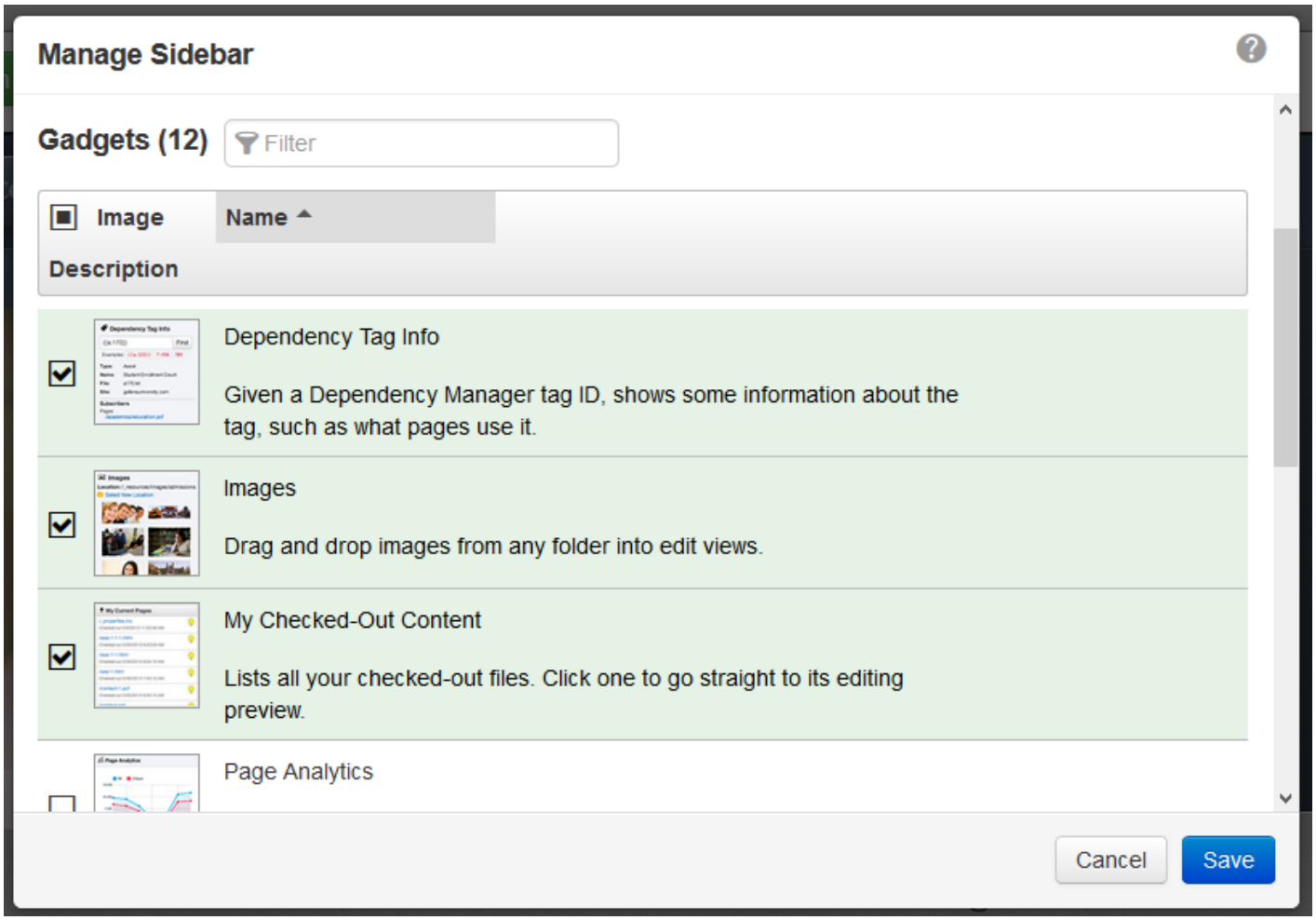
The Gadgets sidebar includes the following system gadgets by default:

- Dependency Tag Info: Search functionality for dependency manager tag that reports information about the tag. Valid search syntax is shown below the field.
- My Checked-Out Content: Shows the content checked out by the current user and the date/time stamp that the content, which can be a page, asset, or file, was checked out. Within this gadget, the pages are linked and can be clicked to for editing or approving. The light bulb icon indicates the page is checked out and clicking the icon checks the page back in.
- Activity: Activity shows content with recently performed actions such as a scheduled publish, expire, or upload. Administrator only.
- Images: Drag and drop images from any folder into edit views.
- Page Info: Displays information about the file currently being viewed or edited.
- Page Analytics: Allows users to view Google Analytics data for the page they are currently viewing or editing.
- Snippets: Drag and drop any snippet into an edit view.
- URL Shortener: Provides a utility to shorten a URL, which can then also be dragged onto a page.

Choosing Gadgets on the Gadget Sidebar



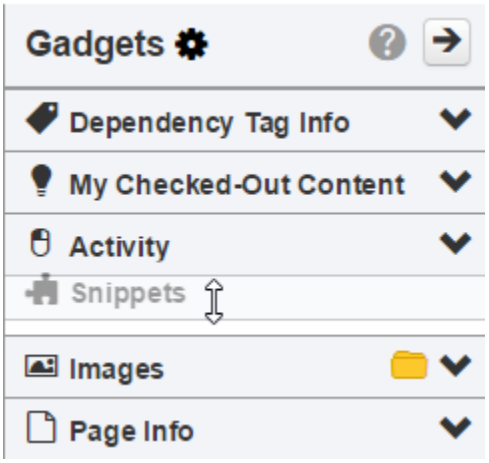
To show and hide gadgets in the Gadgets sidebar, click the **Choose Gadgets** icon (circled above) to be taken to the **Manage Sidebar** modal.



The Manage Sidebar modal shows the Sidebar gadgets that are available to the user. Gadgets that are currently configured to be available on the Sidebar are listed and can be filtered by name. Functionality includes:

- **Filter**: Enter two or more characters to filter by gadget name.
- **Hide**: To hide a gadget from view on the Sidebar, click anywhere within the green gadget box or click the checkbox to clear the selection. A gadget configured to be hidden is shown in gray.
- **Show**: Click anywhere within the gadget box or the checkbox to select a gadget to show on the Sidebar. A gadget configured to be shown is shown in green.

Rearranging Sidebar Gadgets



A user may relocate the gadgets on the sidebar by dragging them into a different order. Users can click and hold on the gadget's title bar and move the gadget up or down in the list.