Beginner Workshop Activity Guide

2012 User Conference

TUESDAY, MARCH 6

2:00PM – 5:00 PM

Beginner Training Workshop

Attendees will learn the end user functions of OU Campus™. They will learn how to log into OU Campus and edit pages. They will be introduced to the other functions available, including creating Assets. They will also be introduced into the administrative functions.

Training Agenda

Opening and Intro into OU Campus

2:00 PM – 2:45 PM

End-User Training

2:45 PM – 3:30 PM

- Login and Edit a Page
- Publish Pages
- Create Assets

BREAK

3:30 PM – 3:45 PM

End-User Training

3:45 PM – 4:15 PM

- Create new pages
- Upload files

Admin Overview

4:15 PM – 4:45 PM

- Workflow
- Dependency Manager
- LDP Overview
- Admin Tab
- Setup Tab
- Add-Ons Tab

Intermediate and Advanced Workshop Overview

4:45 PM – 5:00 PM

End of Beginner Training

Contents

Introduction and Logging into OU Campus

Welcome to the Beginner Training Workshop. When you have completed this section, you will understand how to log in to the OU Campus™ interface.

This activity guide is to be used during the workshop in conjunction with the "OU Campus End-User Reference Guide" that is available on the Support site at: http://support.omniupdate.com/documentation/ox/interface/pdfs/basic.pdf. This activity guide will provide step-by-step instructions for the hands-on activities that will be performed during the workshop.

The "OU Campus End-User Reference Guide" contains detailed information on the activities that will be covered in the workshop, as well as additional information, including features that are reviewed during the workshop but do not have a hands-on activity and best practices with regard to workflow.

Also, this activity guide, as well as the "OU Campus End-User Reference Guide," can be accessed at: http://workshop.oudemo.com.

Getting Started

To get started, first log into the workshop.

1. Navigate to the homepage provided with registration/check-in:
   http://workshop[#].oudemo.com
2. Click on the DirectEdit link found at the bottom of the page. It is the "Last Published [DATE]."
   Last Published 2/24/12
3. Log into OU Campus using the username and password provided.
   Username: user[#]
   Password: user
   

4. Click "Login."

*Remember to replace **[#]** with the number provided during registration/check-in.*

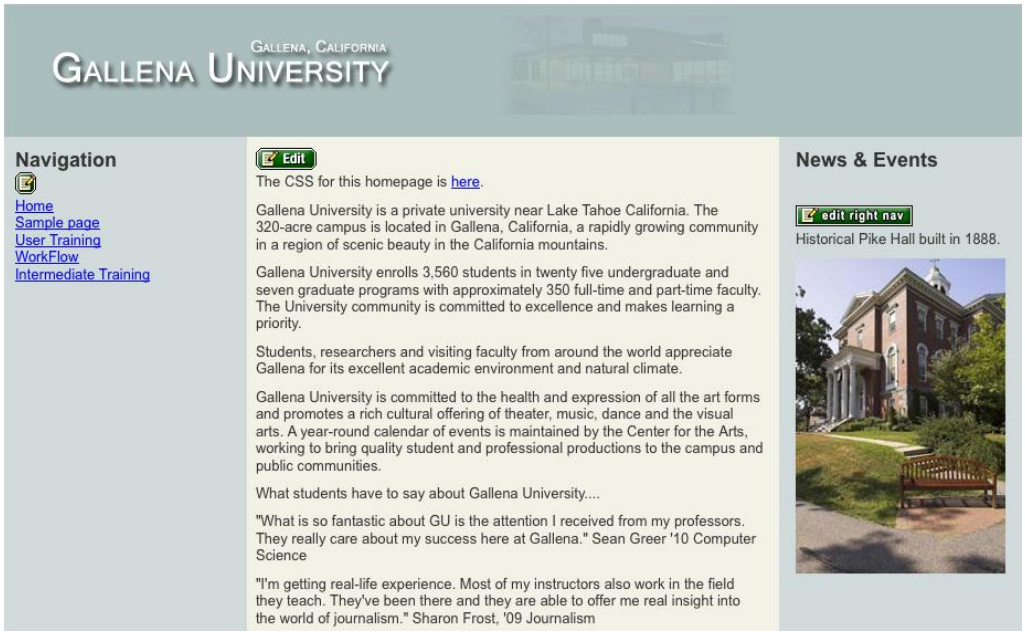
Now it is time to start working in OU Campus as a user.

Edit a Page Using the WYSIWYG Editor

When you have completed this section, you will understand how to edit pages and add content using the WYSIWYG editor.

Adding Content

1. Once you have logged in, you may see several areas that you can edit. These areas are noted by a green "Edit" button. Clicking any of these buttons will open the WYSIWYG (What-You-See-Is-What-You-Get) Editor. Click the "Edit" button over the center area to edit this area.

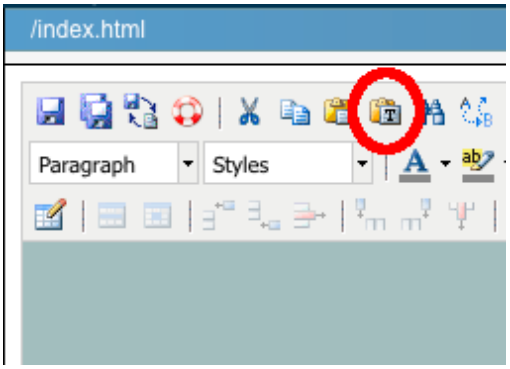


2. You can use the icons in the menu bar just as you do in Word documents.
   Note**:** There is a quick guide for the WYSIWYG toolbar available for your convenience.

3. Copy two or more paragraphs from an existing web page, text file or Word document. If you need something to copy, use the first two paragraphs at http://support.omniupdate.com.

4. Navigate back to your page in the editor and paste under the existing content using the "Paste as Plain Text" tool in the WYSIWYG toolbar.

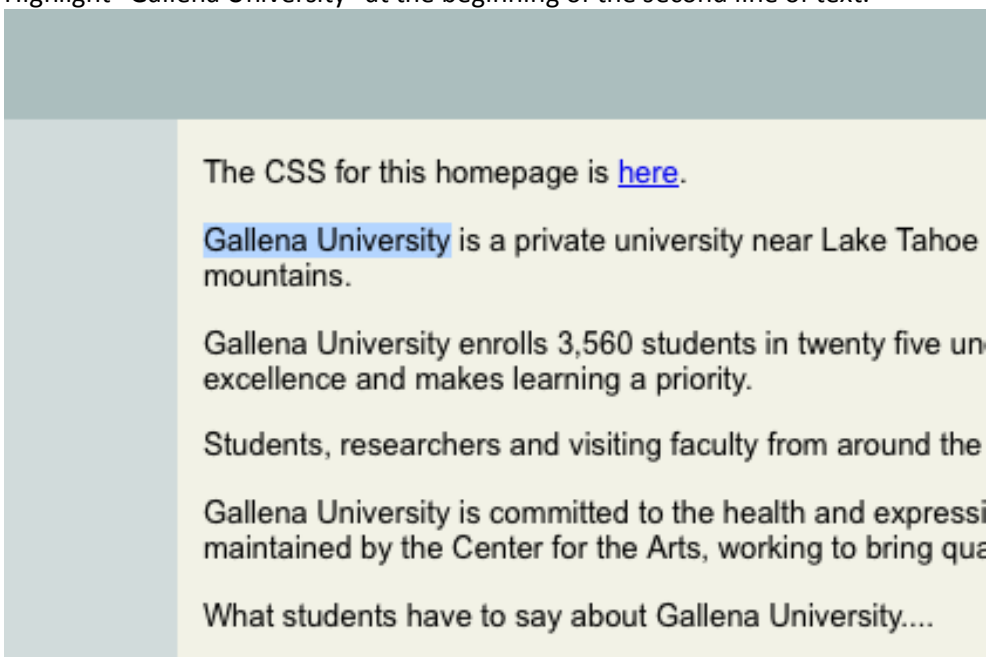
5. It is advisable to use the "Paste as Plain Text" tool (rather than the "Paste" tool) to avoid unwanted styles and formatting from being transferred into your new page.



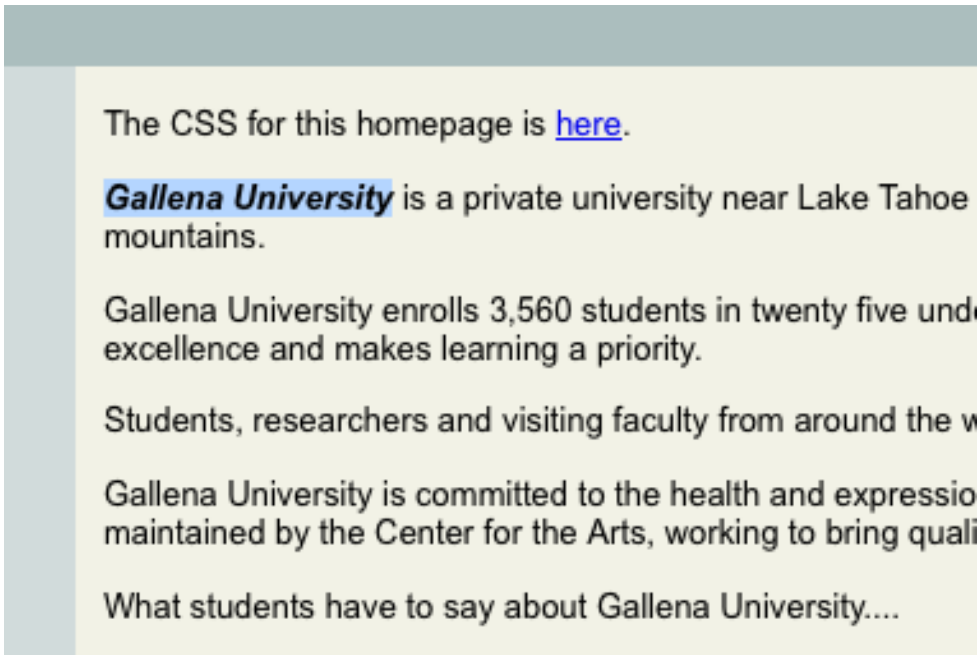
Formatting Text

1. Now use the WYSIWYG toolbar to add formatting to the text on your page.

2. Highlight "Gallena University" at the beginning of the second line of text.



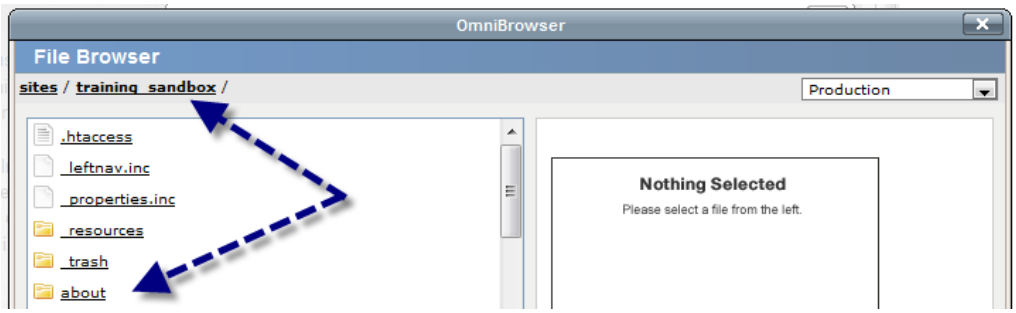
3. Click the **B** icon on the toolbar to turn the selected text bold. Click the *I* icon to make the text italic. You can remove these styles by clicking the applicable button again.



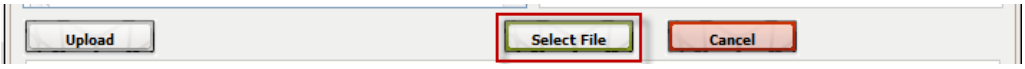
Inserting a Link

1. In the WYSIWYG editor, highlight the text that would like to link.
2. Click on the "Insert/Edit Link" icon: 
3. Click on the "Browse" button to the right of the "Link URL" field.

4. Find the file to which you would like to link. If the desired page is not in the selected directory, use the breadcrumb at the top of the page and the folders within the window to navigate to the desired page.

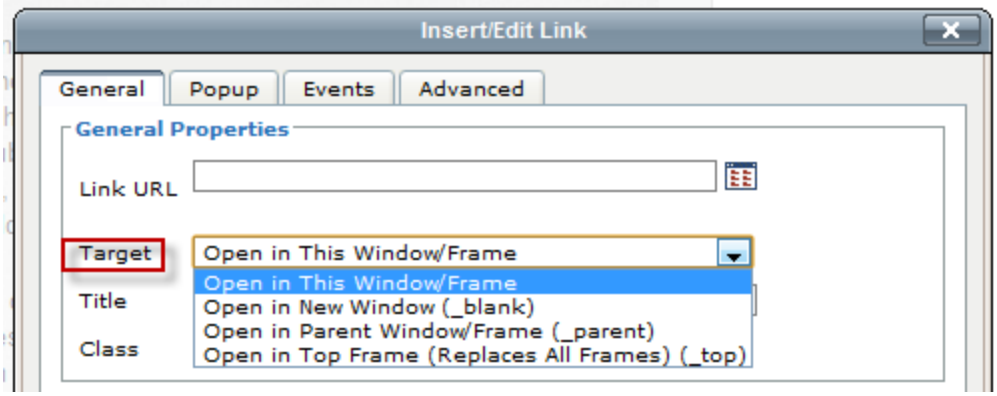


5. Once you have found your desired file, click on the file name and choose "Select File".

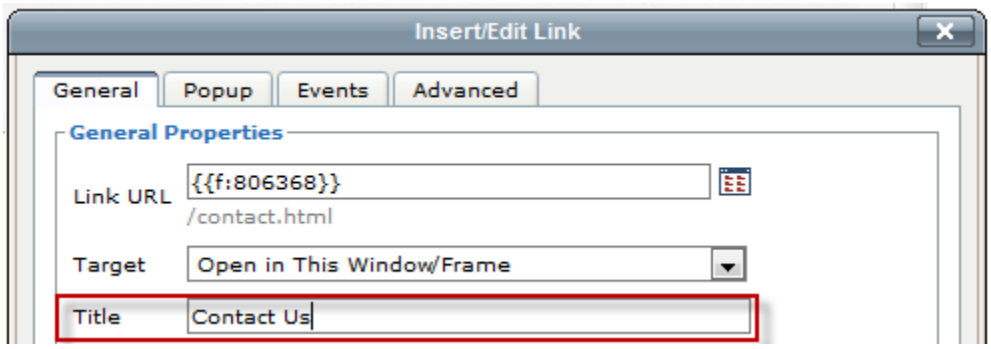


6. As a general rule of thumb, when inserting a link to another page on your website, the link should open in the same window. When inserting a link to a page outside your website, or to a PDF, doc, or other similar file, the page should open in a new window. This selection is made in the field labeled "Target."

   - Linking to pages on the institution's website: Open in This Window/Frame
   - Linking to pages on another site or binary files: Open in New Window (_blank)



7. It is both valuable and important to populate the "Title" field as this is used by screen readers. Designating a title helps keep the site in compliance with ADA 508 compliance standards.

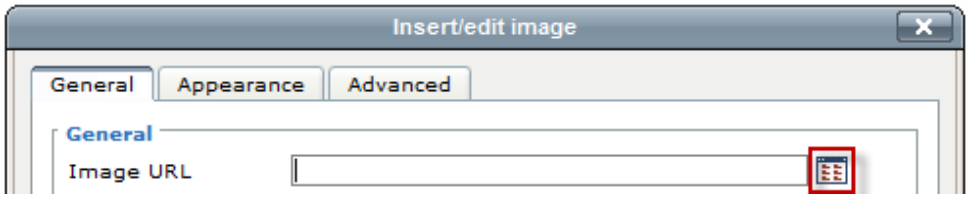


8. Click "Insert".

Inserting an Image

1. Click on the "Insert Image" icon: 

2. Enter the URL to the external Image or click on the "browse" button. This button is located next to the "Image URL" field.

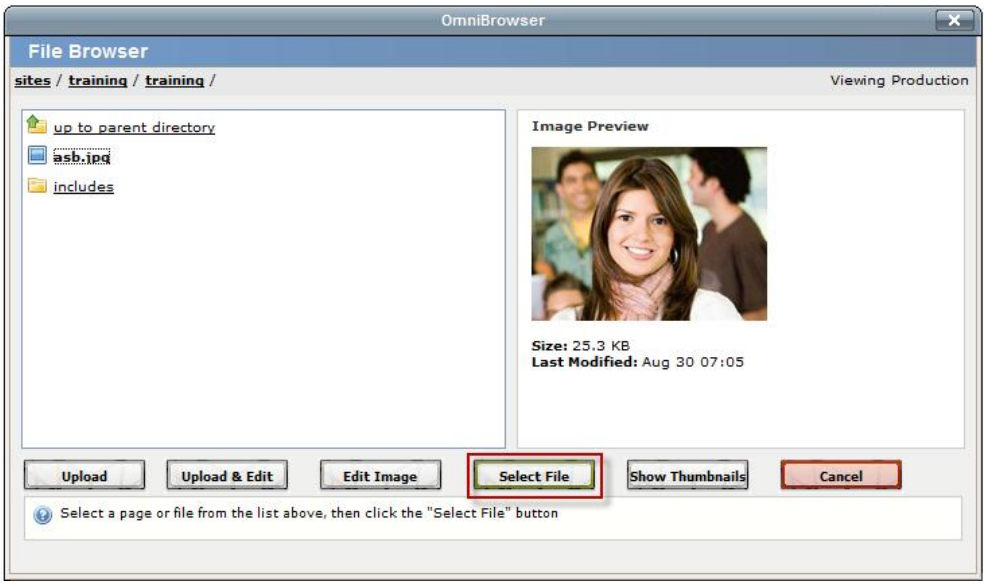


3. Browse to the appropriate image using the same method you used for inserting a link.

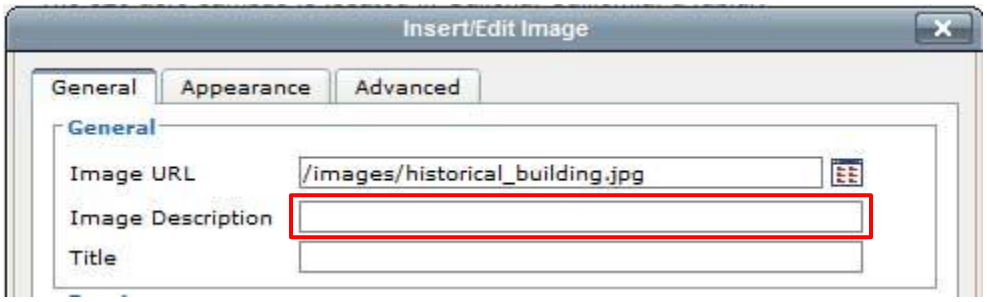
4. Click the "Show Thumbnails" button to preview images in the current directory.

5. Once you find the image, click the image filename, and click "Select File."

6. If the necessary image has not already been uploaded to the Production Server, it can be uploaded by selecting “Upload” or “Upload & Edit”. Keep in mind that the availability of the “Upload” button is based on permissions.



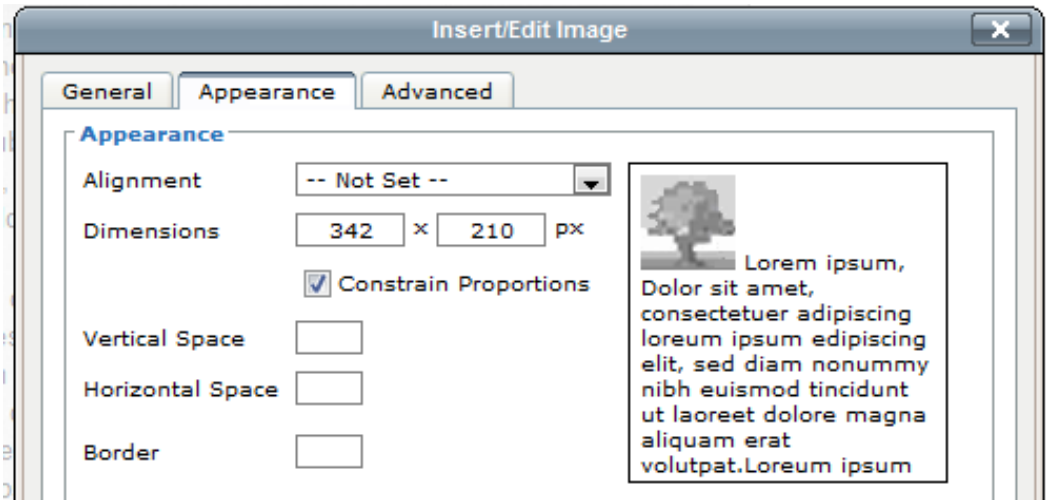
7. Add an “Image Description”, this is required and will be used by screen readers for ADA 508 compliance.



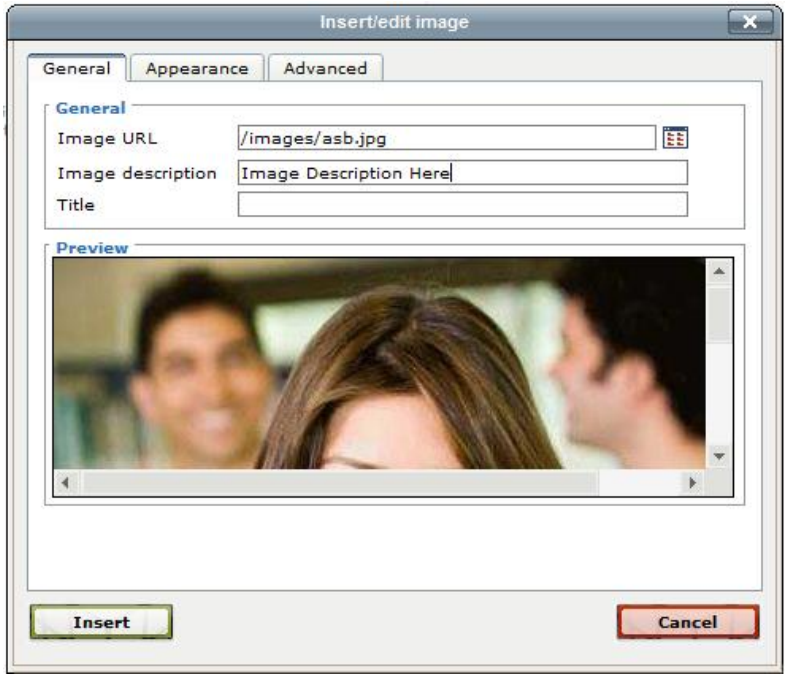
8. If desired, update the “Alignment” and/or “Dimensions” on the Appearance tab.

9. If desired, add padding around your image. Type dimensions in Pixels inside the “Vertical Space” and “Horizontal Space” fields.
   Note: Generally between three (3) and five (5) Pixels will provide enough padding.

10. If desired, designate a border measured in Pixels.
    Note: Two (2) Pixels is normally sufficient.



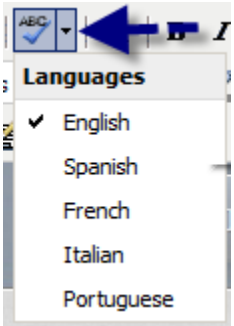
11. Click “Insert”.



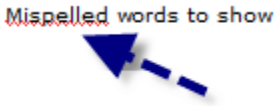
Spell Check Your Page

1. Activate spell check by clicking on the “Toggle Spell Checker” button. 

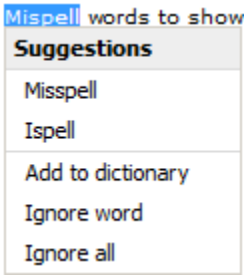
2. The default dictionary is in English. However, if the page should be edited in another language (available languages are: English, Spanish, French, Italian, and Portuguese), simply click on the downward facing arrow and select another language.



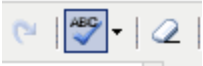
3. Misspelled words are identified with a wavy, red line.



4. To fix the misspelled word, simply click on it. This will bring up a pop-up with the available options. Select the appropriately spelled word, ignore the word, or, if access has been granted, add the word to the dictionary.



5. Keep in mind that the browser's spell checker may be active and marking words as misspelled while the page is being edited. Only OU Campus's spell checker will reference the OU Campus Custom Dictionary. To verify that a word is being marked as misspelled by the OU Campus dictionary, look to see if the spell check icon is highlighted. This indicates that OU Campus spell checker is being used.



Save Your Page

1. Click the Save icon to save the changes that have been made to the page. 
   Note: Using the Save icon will also close the WYSIWYG Editor and take the user to a preview of the page.

2. If you want to save-in-place while continuing to edit, simply use the keyboard shortcut (CTRL+S for Windows and CMD+S for Mac).

Publish the Page

When you have completed this section, you will understand how to publish your edited page to the live web site. You will learn how to utilize Final Check to check spelling and link validity, as well as OU Social (Facebook and Twitter).

Once a page has been edited, it can either be sent to another user for approval, or it can be published directly to the Production Server and live site. The ability to publish pages is based on permissions, and not all users will see the "Publish Now" or "Schedule" buttons.

Publish

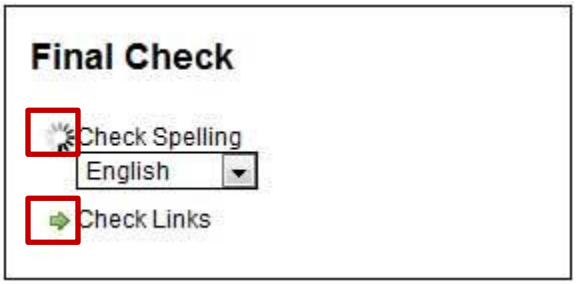
1. If granted publishing rights, a "Publish Now" button will appear at the top of the page.

2. To publish the page to the Production Server, simply click on this button. This will bring up the publish screen, containing some additional tools.
    - Final Check (spell check and link check)
    - Twitter
    - Facebook

Final Check – Check Spelling

1. Use Final Check to check spelling, links and validity of your page.

2. Some pages may run these checks automatically. If the module is running, a circle progress icon is displayed. You can choose to run the modules manually by clicking on the green arrow.



3. To run a final spell check, click on the green arrow next to "Check Spelling". Ensure that the correct dictionary is selected.

4. If there are errors, you will see the number of spelling errors reported under the dictionary selection dropdown.

5. To view spelling errors in this window, choose “More”. To view these errors in a new window, choose “New Win”.

Final Check – Link Check

1. Check the links on your page by clicking the green arrow next to “Check Links”.

2. If there are invalid links on your page, the number of invalid links will display below “Check Links”.

3. To view invalid links in the window, choose “More”. To view these links in a new window, choose “New Win”.

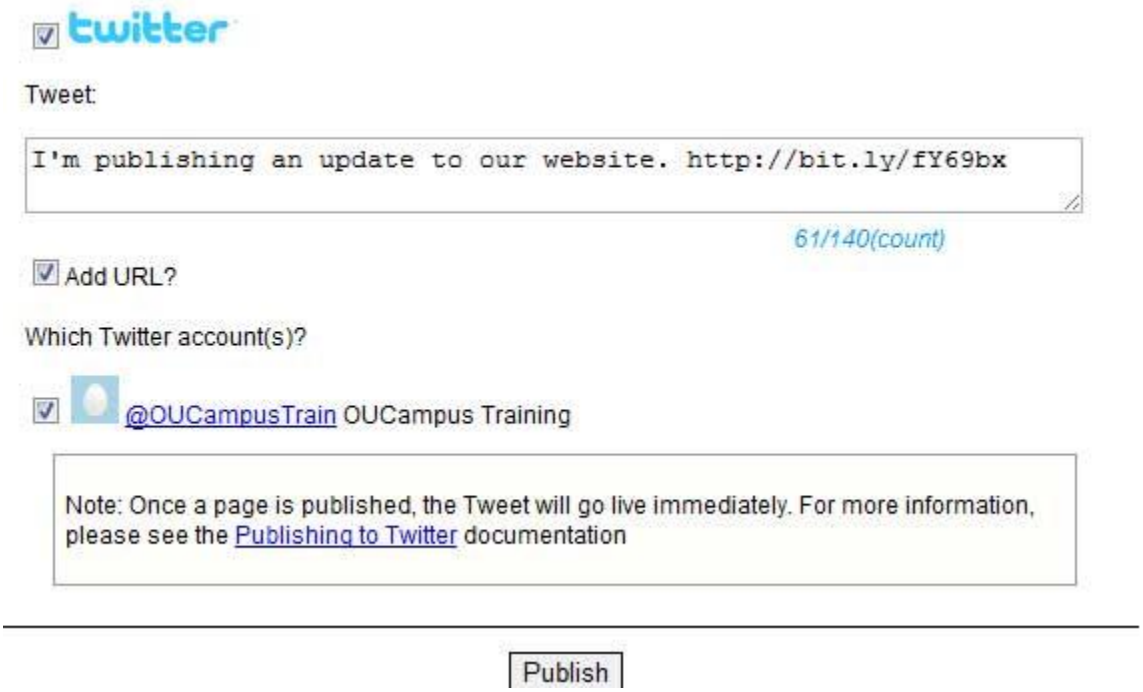
Twitter

1. Use the Twitter module to generate a Tweet through a linked Twitter Account on publish.

2. Select the checkbox to the left of the Twitter icon.

3. Enter the text you would like to include in the published tweet. If you would like to include a link to your published page in the tweet, check the “Add URL?” checkbox. This will automatically generate a link to your page.

4. Select the account(s) to which the Tweet should be sent.



Facebook

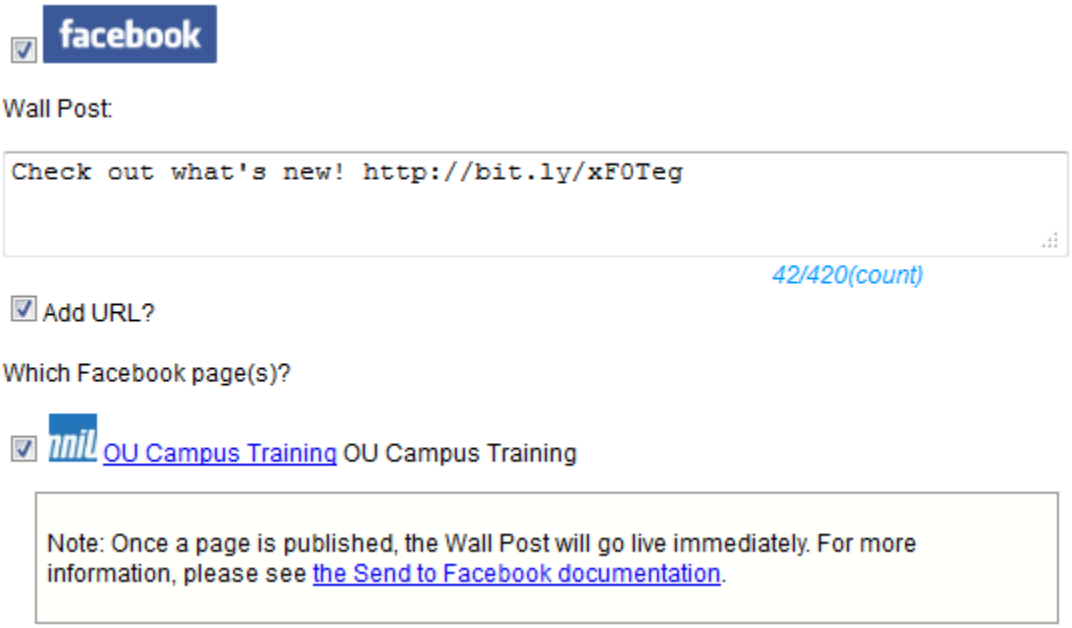
1. Use the Facebook module to generate a wall post through a linked Facebook Page on publish.

2. Check the box next to “Facebook.”

3. Enter text to include in the wall post.

4. Select to “Add URL?” if the URL to the page being published should be included in the wall post.

5. Select the Page(s) to which the wall post should be sent.



Complete Publish

1. Select the "Publish" button to publish your page to the Production Server and live site.

2. Once the publish is complete, the system will present a success message.

3. You can choose to view your published page in the current frame (within OU Campus), in the current window (will navigate away from OU Campus) or in a new window by clicking the links below the success message.

Create Assets

When you have completed this section, you will understand how to create Assets that can be used within the content areas of your pages.

Asset Manager

1. Navigate to Asset Manager by going to Content > Assets.

2. Create a new Asset by clicking on the "New" button.

3. Choose an Asset type from the drop-down.
   - Web Content
   - Plain Text
   - Source Code
   - Image Gallery
   - Managed Form

Web Content Asset

The information required for Asset creation will vary based on the type of Asset you chose to create. Use the following steps as a guide for creating a "Web Content Asset."

1. Enter an Asset Name, this will be shown in the Asset Manager view.

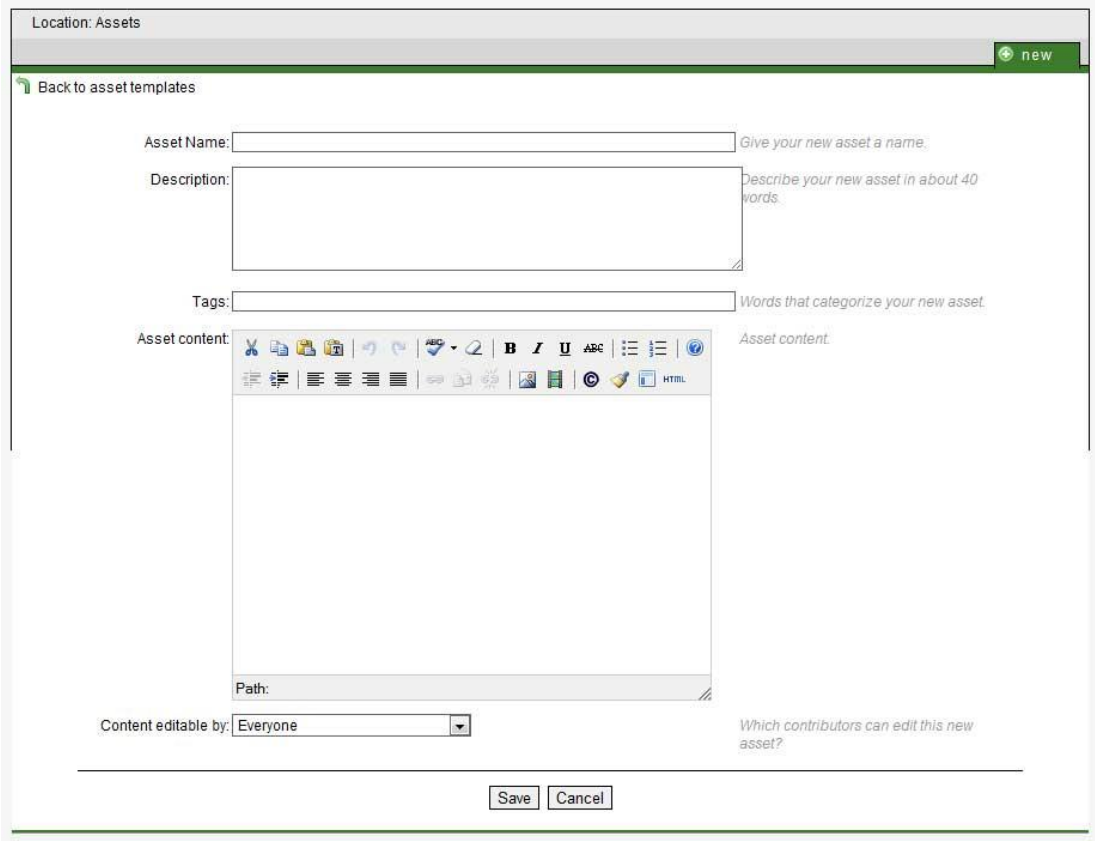
2. Enter a Description for your Asset to define the contents.

3. Enter Tags to categorize your new Asset.

4. Enter your Asset content within the mini-WYSIWYG window. You can utilize the toolbar to modify the content of your asset.

5. Choose which group to make this Asset available for editing to using the "Content editable by:" dropdown.

6. Click “Save” to create your Asset.



Plain Text Asset

The information required for Asset creation will vary based on the type of Asset you chose to create. Use the following steps as a guide for creating a “Plain Text Asset.”

1. Enter an Asset Name, this will be shown in the Asset Manager view.

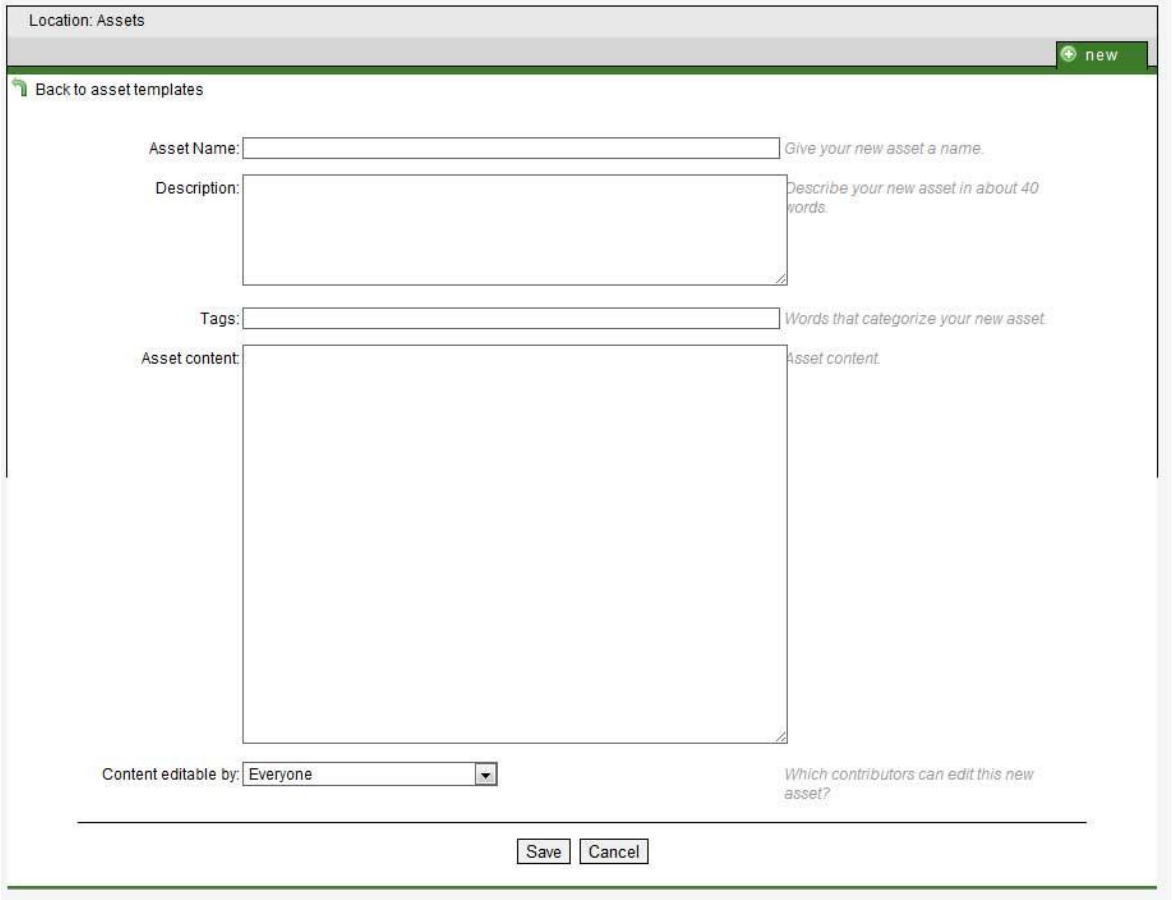
2. Enter a Description for your Asset to define the contents.

3. Enter Tags to categorize your new Asset.

4. Enter your Asset content within the text field. This is a text-only field.

5. Choose which group to make this asset available for editing to using the “Content editable by:” dropdown.

6. Click “Save” to create your Asset.

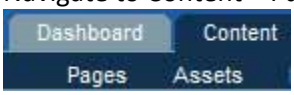


Create a New Section

When you have completed this section, you will understand how to create a new section by using the New Section Template within OU Campus.

1. New sections enable you to create a new directory with an index page.

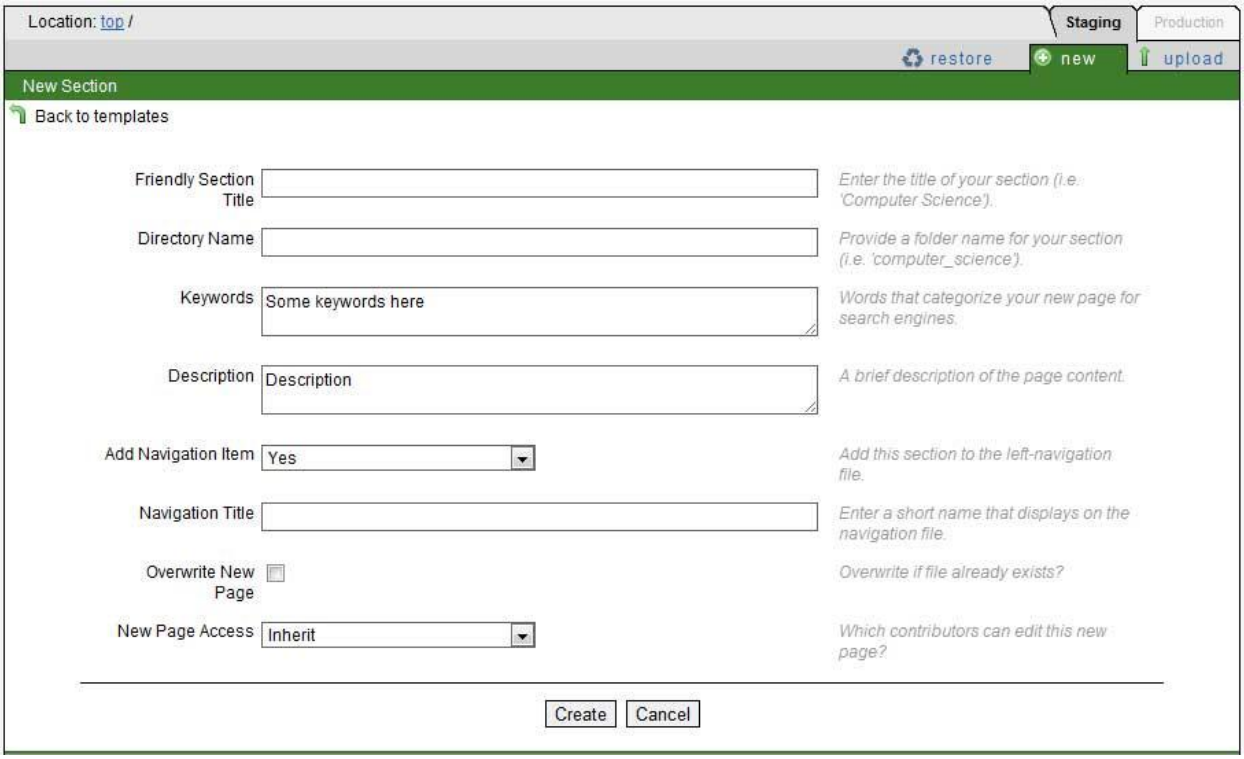
2. Navigate to Content > Pages.



3. Click on the “New” button in the upper right corner of this screen. 

4. The available templates will display in the dropdown. Choose the template called, “New Section” by clicking on the icon.

5. A dropdown form will appear, fill out the information to populate your New Section.



6. Enter a friendly (capitals and spaces are allowed) Section Title. This will become the page title for the New Section's Index page.

7. Enter a file system friendly (lowercase letters with underscores) name for your New Section folder.

8. Designate any Meta Keywords to be placed in the New Section's Index page.

9. Designate any Meta Description content to be placed in the New Section's Index page.

10. Choose to include the link to this New Section in your Side Navigation by choosing "yes" or "no" from the "Add Navigation Item" dropdown.

11. Enter a Navigation Title to display in the Side Navigation.

12. If you would like to overwrite a file or section with the same name as your new file, check the "Overwrite New Page" checkbox.

13. Set access to your New Section by choosing the appropriate group from the "New Page Access" dropdown. Choose "Inherit" to inherit any current access settings.

14. Once all the fields have been populated, click "Create".

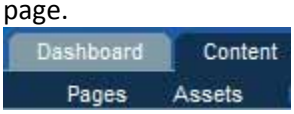
Creating & Editing a New Page

When you have completed this section, you will understand how to create a new page by using the New Page Template within OU Campus.

Create a New Page

1. The new page template enables you to create a new page to which you can add content.

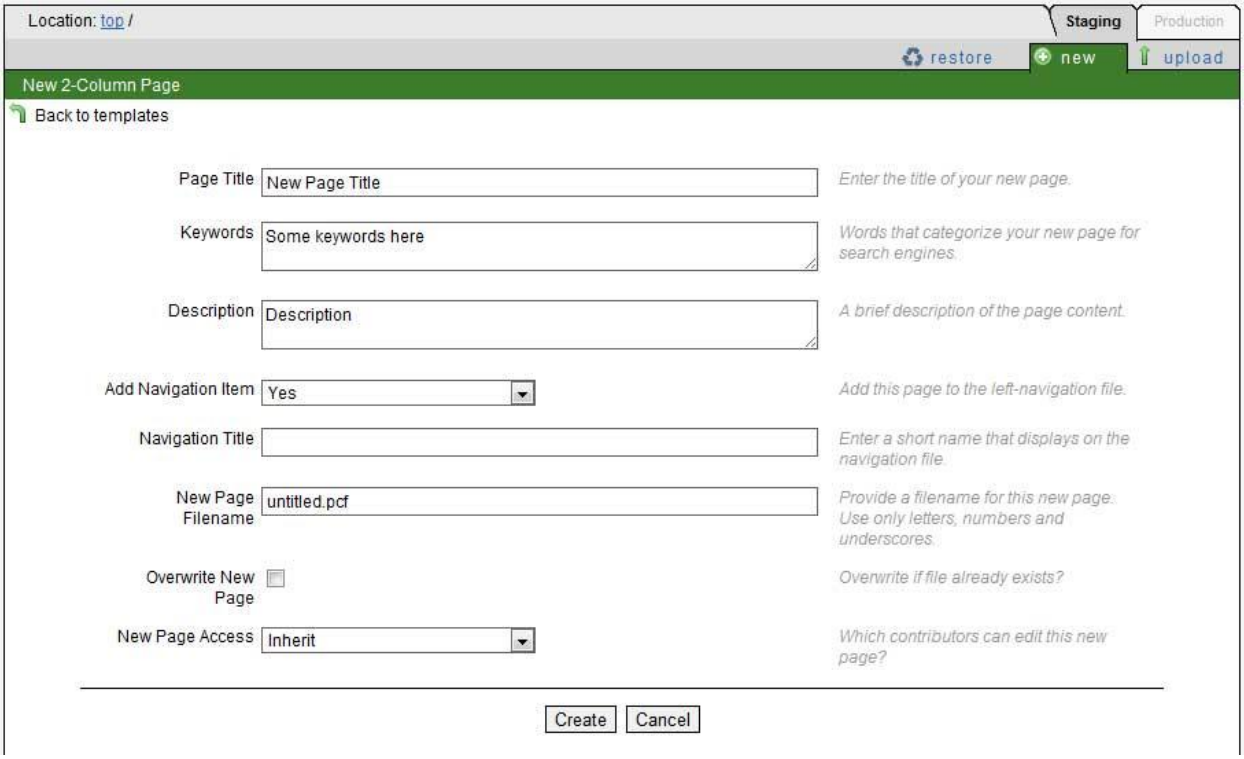
2. Navigate to Content > Pages and navigate to the folder in which you would like to create a new page.



3. Click on the "New" button in the upper right corner of this screen. 

4. The available templates will display in the dropdown. Choose the template called, "New Page" by clicking on the icon.

5. A dropdown form will appear, fill out the information to populate your New Page.



6. Enter a friendly (capitals and spaces are allowed) Page Title. This will become the page title for the New Page.

7. Designate any Meta Keywords to be placed in the New Page.

8. Designate any Meta Description content to be placed in the New page.

9. Choose to include the link to this New Page in your Side Navigation by choosing “yes” or “no” from the “Add Navigation Item” dropdown.

10. Enter a Navigation Title to display in the Side Navigation.

11. Enter a file system friendly (lowercase letters with underscores) name for your New Page.

12. If you would like to overwrite a file with the same name as your New Page, check the “Overwrite New Page” checkbox.

13. Set access to your New Page by choosing the appropriate group from the “New Page Access” dropdown. Choose “Inherit” to inherit any current access settings.

14. Once all the fields have been populated, click “Create”.

Add Content to Your New Page

1. Click on the name of your New Page, and choose the “Check-Out” icon.

2. "Edit" buttons will appear on the page, marking the regions of the page you are able to edit.

3. Click on the edit button for the main content area of your page.

4. You are now in the WYSIWYG (What-You-See-is-What-You-Get) Editor. There are a variety of tools available to you within the WYSIWYG toolbar.

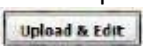
5. You can begin typing content within the editable region, or paste some external content by using the "Paste As Plain Text" tool.

Upload and Edit an Image

1. Make sure you are in the WYSIWYG Editor, and that your toolbar is visible.

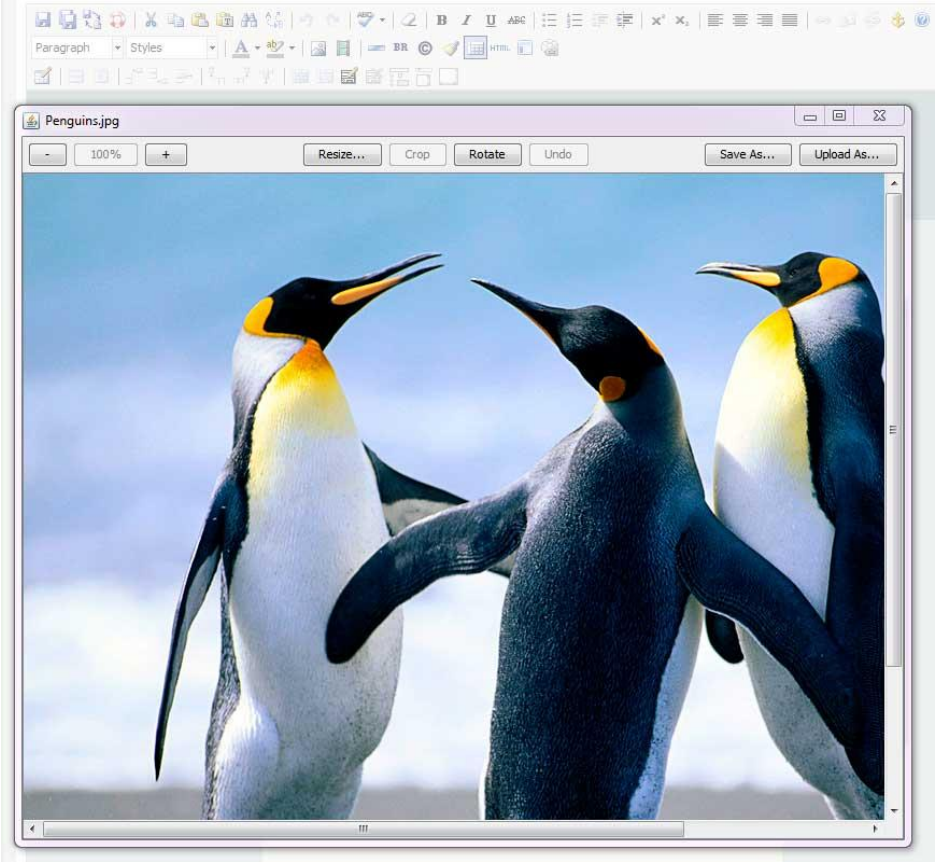
2. Click on the "Insert/Edit Image" icon: 

3. On the resulting pop-up, click on the browse button next to the "Image URL" field.

4. To edit an image while uploading it, use the "Upload & Edit" button at the base of the insert image window. 

5. Double click on the desired file on your local computer, or choose 'Open.'

6. The image you chose will open in an image editor within OU Campus.



7. Choose “Resize”, and resize the image. Make sure “Scale Proportionally” is checked to avoid skewing the image dimensions.

8. You can choose to revert back to the original image by choosing “Undo”.

9. Now, click and drag your cursor over the image. You will notice that the “Crop” button has illuminated. You can crop the image to the specifications of the dotted line created by clicking and dragging your mouse over the image.

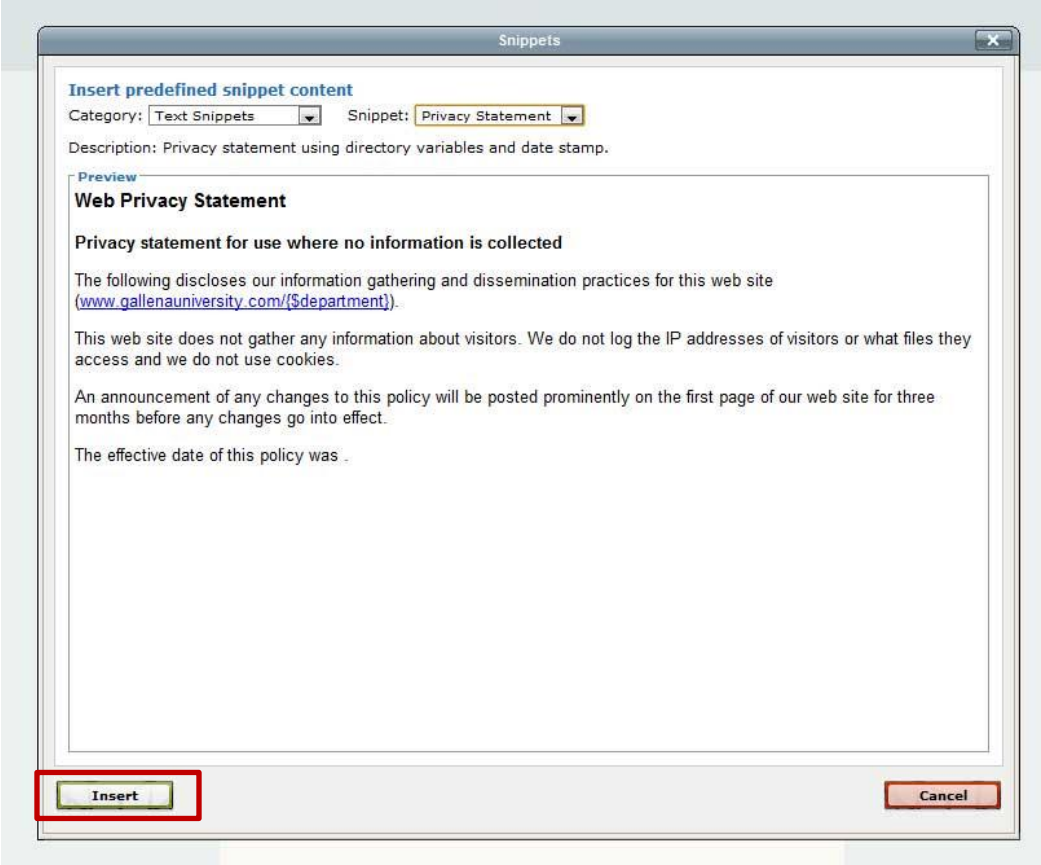
10. Once your adjustments are complete choose “Save As” to save the image on your local machine, or choose “Upload As” to upload the image to the Production Server.

Add & Modify a Snippet

1. Make sure you are in the WYSIWYG Editor, and that your toolbar is visible. Click on the “Edit” button of the region you would like to edit to reach this screen.

2. Place your cursor at the position in which you would like to add a Snippet.

3. Click on the “Insert Predefined Snippet Content” button: 



4. Select a Snippet category for the first dropdown.

5. This will populate the next dropdown list. Choose the snippet you would like to use from the "Snippet" dropdown list.

6. Once a snippet is selected you will see a preview of the selected Snippet. To confirm your choice, click "Insert."

7. This will insert the HTML code into your page and enable you to modify the default content to your specifications.

Add a Newly Created Asset

1. You should have already created two Assets, one Plain Text Asset and one Web Content Asset. If you have not yet created these items, return to the "Create Assets" section of this document.

2. Navigate to the page in which you would like to insert the Asset.

3. Click the "Edit" button for the region you would like to insert the Asset. This should bring up the WYSIWYG Editor.

4. Place your cursor at the position in which you would like to place the Asset. Click the "Insert/Edit Asset" button on the toolbar: 

5. Click on the desired Asset. Some assets will provide a preview in the right column window.

6. Once you have chosen your desired asset click “Select Asset.”

7. When the Asset is inserted on the page, it is possible that it will not render until the page is saved. Whether or not the Asset renders in the WYSIWYG Editor, it will appear in a box with hash marks behind it.

   ASSET "Comments" CANNOT BE SHOWN IN WYSIWYG

Save a Modified Page

1. Make sure your page is open for editing in the WYSIWYG Editor.

2. Make some changes to your page, as described in the previous sections.

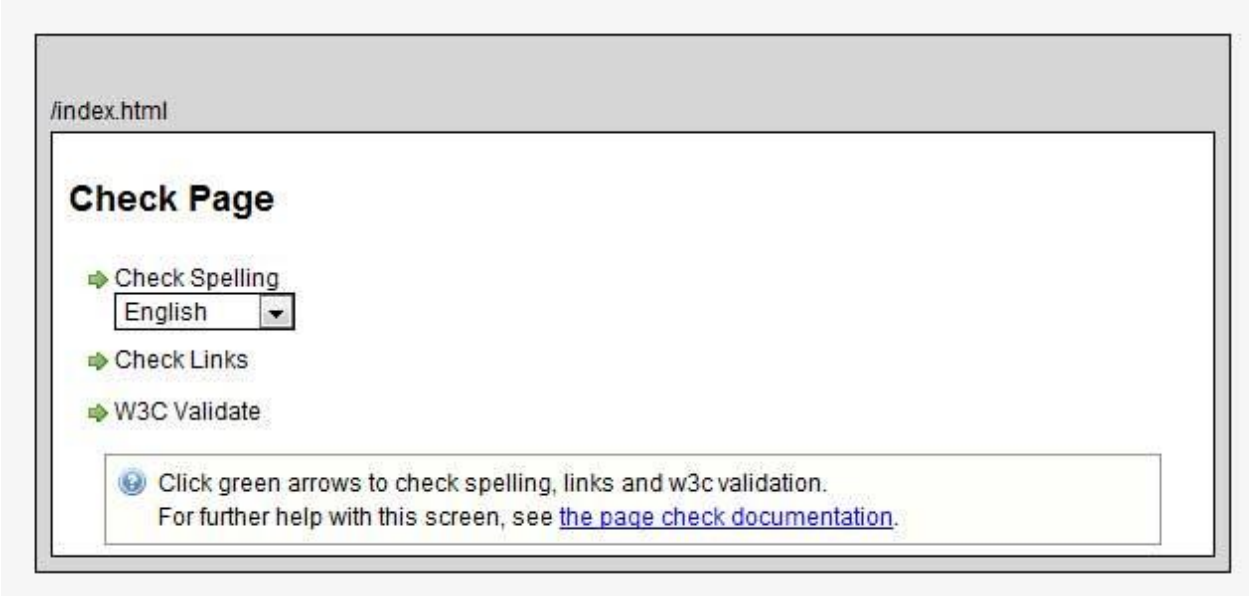
3. Confirm your changes, and click the “Save” icon: 

Run Page Check

When you have completed this section, you will understand how to use the Page Check.

1. Page Check is used to check for invalid links and spelling mistakes.

2. To begin, make sure your page is Checked Out and click the "Check" icon located above the preview window.



3. This will bring up the Page Check window, providing us with modules to check spelling, links, and W3C Validation.

4. Begin by clicking on the green arrow to the left of "Check Spelling". Make sure the correct dictionary is selected.

5. If errors exist, an error icon will appear with the option to view errors in the current frame "more" or in a new window "New Win".

6. Move on to check the links in the same manner by clicking the green arrow to the left of "Check Links". If any errors exist, they will appear in the same manner as the spelling mistakes described above.

7. Lastly, check this page for W3C Validity by clicking the green arrow to the left of "W3C Validate". If errors exist, you can access the report in the same manner described above for spelling mistakes.

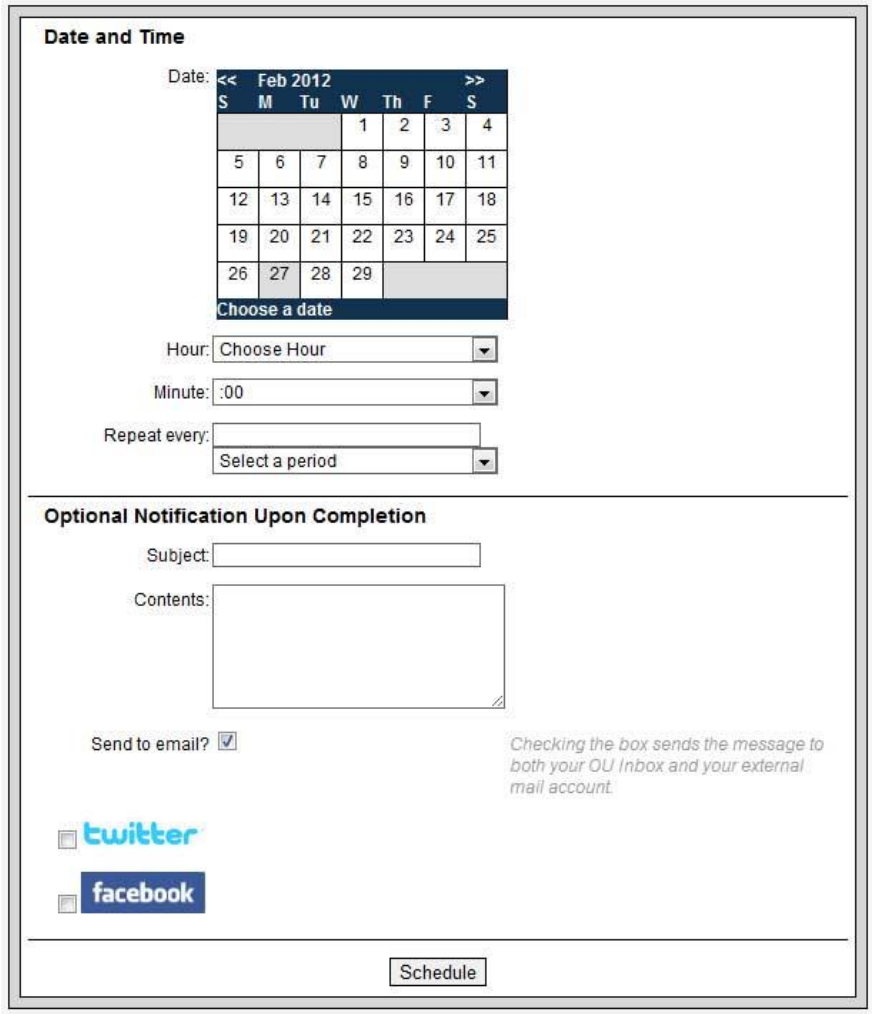
Schedule a Page to Publish

When you have completed this section, you will understand how to schedule a page to be published at a future date and time.

1. Navigate to a page, and make sure it is checked out to you. If it is not, click the “Check Out” icon or light bulb graphic to do so.

2. Next to the “Publish Now” button you should see “Schedule.”

3. Click the “Schedule” icon.



4. To begin, select the date on which you would like this page to publish.

5. Choose the exact time, by quarter hours, which you would like this page to publish.

6. Indicate whether or not the publish should repeat, and designate the measurement for publishing.

7. Next, create an option email message to be sent upon completion of the publish to your Dashboard.

8. Check the “Send to Email” box to indicate that the message should also be sent to your external email (designated in your User Settings).

9. Configure Send to Twitter and Send to Facebook, as explained in previous sections, to enable these actions on page publish.

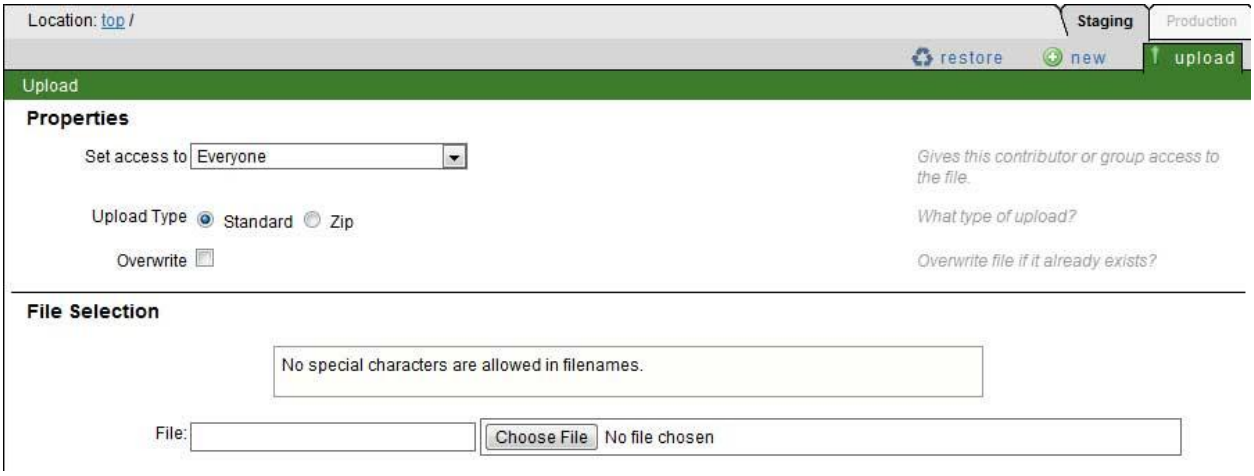
10. Once all of your settings have been entered, click “Schedule.”

Upload a PDF

When you have completed this section, you will understand how to upload a file.

1. To begin, navigate to the file system view. You should see an "Upload" button in the upper right corner.

2. Click on the "Upload" button.



3. Click on "Choose File" to browse for the desired PDF. Once you open the correct PDF, a green arrow will appear to the left of the "Choose File" button if the filename is accepted.

4. Once all of your PDF files have been chosen, click the "Upload" button.

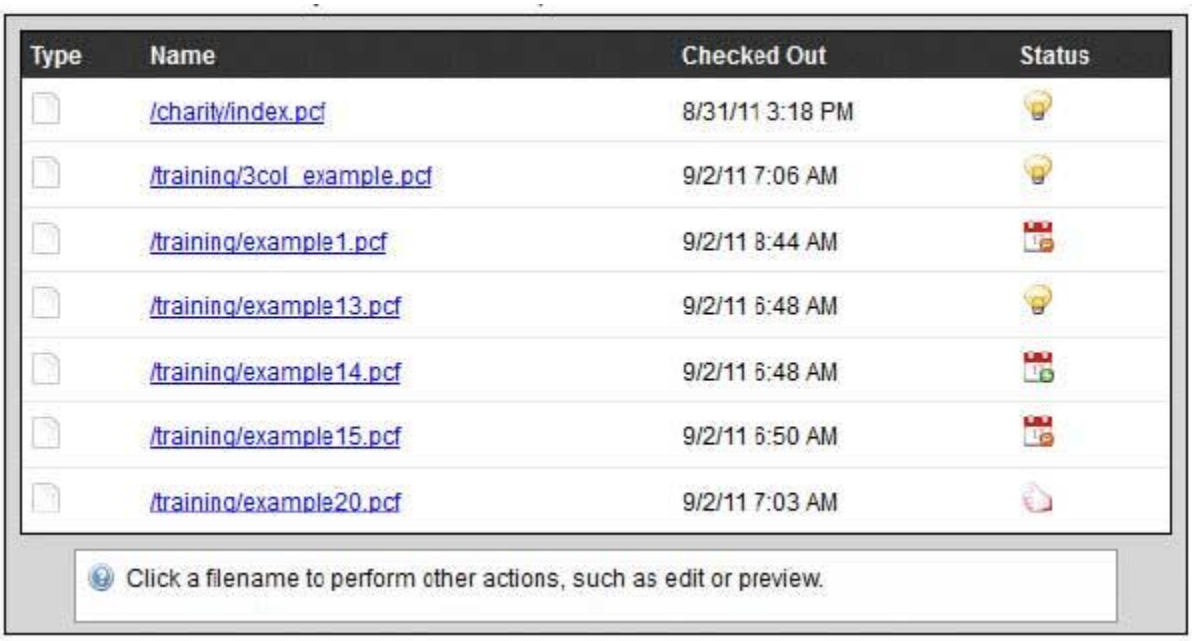
5. You will notice that the PDF's do not appear on the default content tab. To view these files click on the tab labeled "Production". This tab shows all the content on your Live Server. Your PDF's should be visible in this view.

Check Current Projects

When you have completed this section, you will understand how to check the Current Projects and check back in checked out pages.

1. Lastly we want to check in any content we have checked out, so other users can modify those pages if needed.

2. Navigate to Dashboard > Current Projects.



Type	Name	Checked Out	Status
	/charity/index.pcf	8/31/11 3:18 PM	
	/training/3col_example.pcf	9/2/11 7:06 AM	
	/training/example1.pcf	9/2/11 8:44 AM	
	/training/example13.pcf	9/2/11 6:48 AM	
	/training/example14.pcf	9/2/11 6:48 AM	
	/training/example15.pcf	9/2/11 6:50 AM	
	/training/example20.pcf	9/2/11 7:03 AM	

Click a filename to perform other actions, such as edit or preview.

3. This screen will display any pages you have checked out for editing, or pages in the workflow system. When a light bulb is displayed in the "Status" column, that page can be checked in.

4. Click the light bulb icon next to the pages you would like to check in. You will notice there are also workflow icon available. You can manage workflow pages by clicking on those icons.

5. These pages are now available to other users for editing. It is important and advised that this screen be checked prior to logging out for the day.