



OU Campus Version 10 User Guide for WCU

Updated September 5, 2014

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Overview

OU Campus Support

Online support is available through the OmniUpdate Support site at <http://support.omniupdate.com/oucampus10/index.html>.

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 found within OU Campus.

Throughout the site, links are available to help documentation specific to the area or task at hand. These links will open the Support site to the page with the desired documentation.



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



The Support site is available to everyone. Users are encouraged to visit and search the Support site. WCU's Web Team is also available if the answer cannot be found on the Support site or further explanation and clarification is needed.

WCU Campus Support

The Web Services team is Jed Tate, Paige Herman, Patrick Hinkle, Melissa Highter.

Please contact us through the IT Help Desk at 828-227-7487 or ithelp@wcu.edu, or submit a ticket through the self-service portal at <http://help.wcu.edu>.

The folks at the Help Desk are dedicated to taking your requests for assistance, 8-5, Monday through Friday.

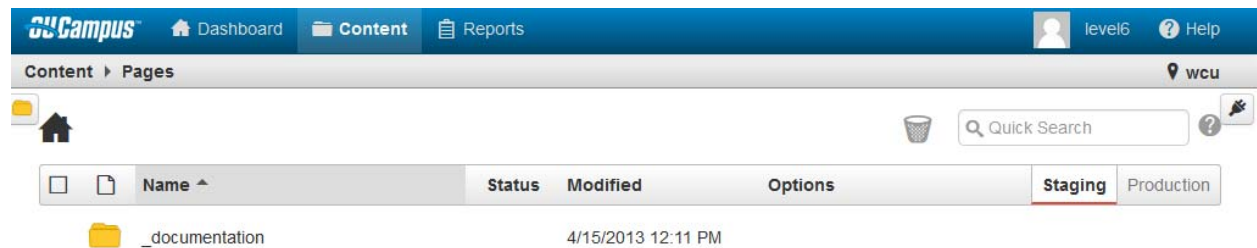
We have a compilation of information about OU Campus and editing WCU web pages at <http://cms.wcu.edu>.

Staging Server and Production Server


OU Campus is housed and run on a staging server. Our staging server is at OU Campus's office in California. This server is separate from the production server on which the published site resides, which is here in Cullowhee. All pages, directories, and assets are created and maintained on the staging server in California. Upon publish, the pages, directories, and assets are pushed to the production server in Cullowhee.

The staging server can be thought of as a preparation area. Once all changes have been made and approved, they are sent to the production server for public viewing as a website.

We approve and publish pages throughout the business day. Pages are then available on the WCU website within 10 minutes of our publishing them.



The screenshot shows the OU Campus CMS interface. The top navigation bar includes 'OU Campus', 'Dashboard', 'Content', and 'Reports'. The user is logged in as 'level6' and can access 'Help'. The breadcrumb trail shows 'Content > Pages'. A search bar labeled 'Quick Search' is present. Below the navigation, a table displays file information:

<input type="checkbox"/>	<input type="checkbox"/>	Name ^	Status	Modified	Options	Staging	Production
		 _documentation		4/15/2013 12:11 PM			

Accessing Pages

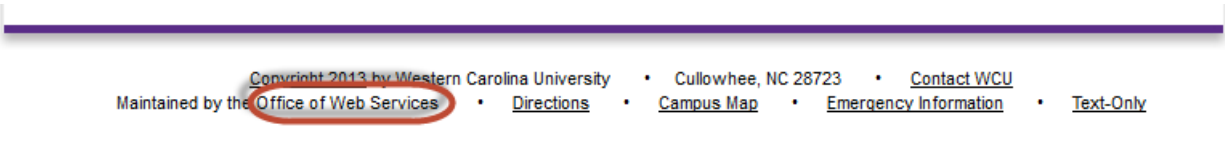
Browsers

OU Campus works in Internet Explorer, Firefox, Chrome, and Safari. The past two versions are supported. More information on browsers:

<http://support.omniupdate.com/oucampus10/about/support/supported-browsers.html>

DirectEdit Link

Initial access is granted from WCU's main website by navigating to the page to be edited and clicking the DirectEdit link. Western Carolina University's DirectEdit link for the WCU.edu site is the "**Office of Web Services**" text found in the footer of the web pages.

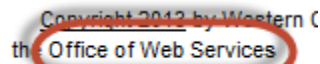


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Maintained by the **Office of Web Services** • [Directions](#) • [Campus Map](#) • [Emergency Information](#) • [Text-Only](#)

For the Museum, Bardo Arts Center, Friends of the Arts, and the Ramsey Center sites, the DirectEdit link is in another phrase in the footer: The Fine Art Museum, John W Bardo Fine and Performing Arts Center, Friends of the Arts, Liston B. Ramsey Regional Activity Center.

To Access a Page to Edit

1. Navigate on WCU's main website to the page you need to edit, Click on the **DirectEdit** link.



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th **Office of Web Services**

2. Choose Western Carolina University in the drop down. Select Remember my select ion permanently – and you should not have to repeat this step if you use the same browser on the

same computer.

InCommon[®] You are accessing:
a.cms.omniupdate.com

Select your School, Organization, or Identity Provider:

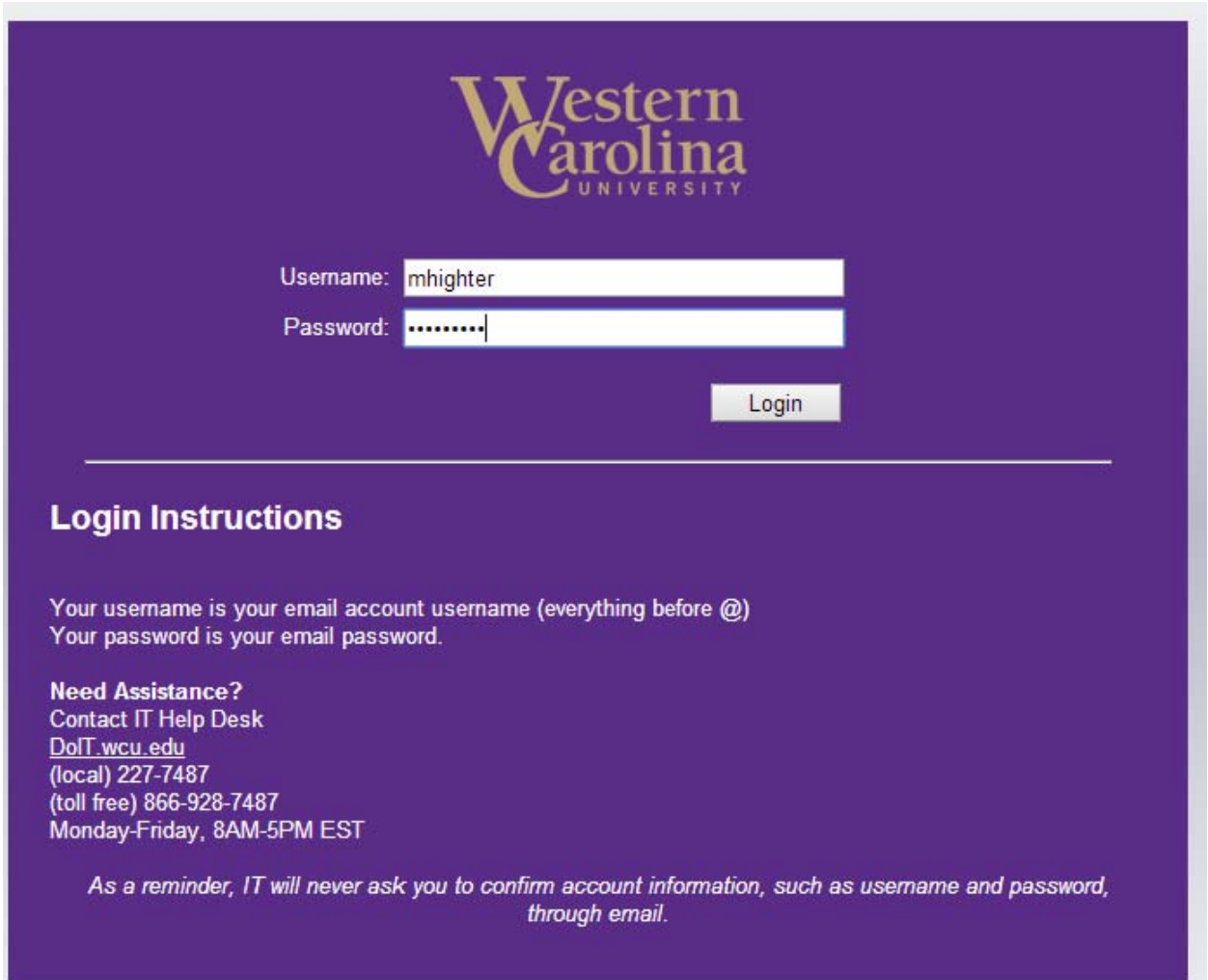
Western Carolina University ▼

- Do not remember my selection
- Remember my selection for this session only
- Remember my selection permanently

[About InCommon](#) | [Help](#)

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3. Click Next.
4. Sign in to WCU using your WCU email/network credentials.



Western Carolina UNIVERSITY

Username:

Password:

Login

Login Instructions

Your username is your email account username (everything before @)
Your password is your email password.

Need Assistance?
Contact IT Help Desk
DoIT.wcu.edu
(local) 227-7487
(toll free) 866-928-7487
Monday-Friday, 8AM-5PM EST

As a reminder, IT will never ask you to confirm account information, such as username and password, through email.

5. You're logged into OU Campus. Begin editing.

Note: Once logged in, clicking on the DirectEdit link from any page on the published site launches OU Campus directly to that page without having to log in again. However, the user must have access to the page in order to edit it.

Note: Do **not** change your password within the OU Campus application.

Log In Error

If you log in from a page for which you don't have access to edit, you will receive an error message. To gain access after this – open a new browser window and go to wcu.edu to a page where you have access to edit. Choose the DirectEdit link, and since you already logged in, you will be taken to your content to edit.

Account Lockout

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 being able to perform additional login attempts. In the event of a user lockout, contact the Help Desk to have the Web Team reset your privileges.

Logging Out

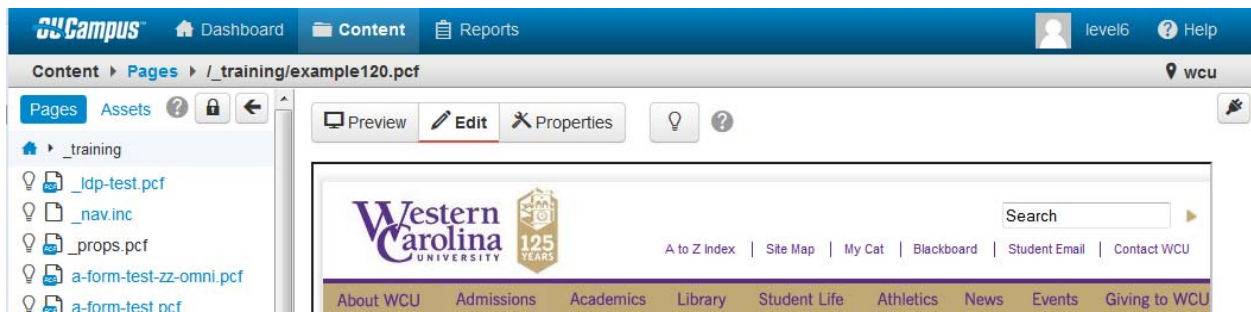
- Hover over your name in the top right corner. Select Logout.
- You will be sent to the wcu.edu homepage.
- **CLOSE YOUR BROWSER** (not just the window or tab, the whole browser).

Navigating Within OU Campus

When logged into OU Campus, navigating between pages and the folder structure can be easily accomplished by clicking on the **black arrow** or **yellow folder** found at the top left of the page.



- Hide the file navigation



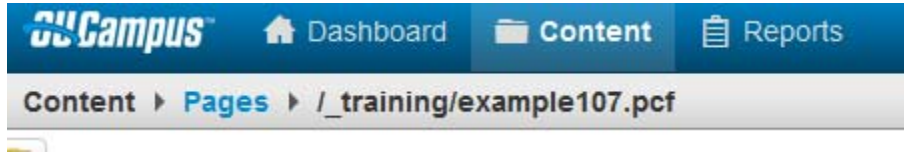
- Show the file navigation



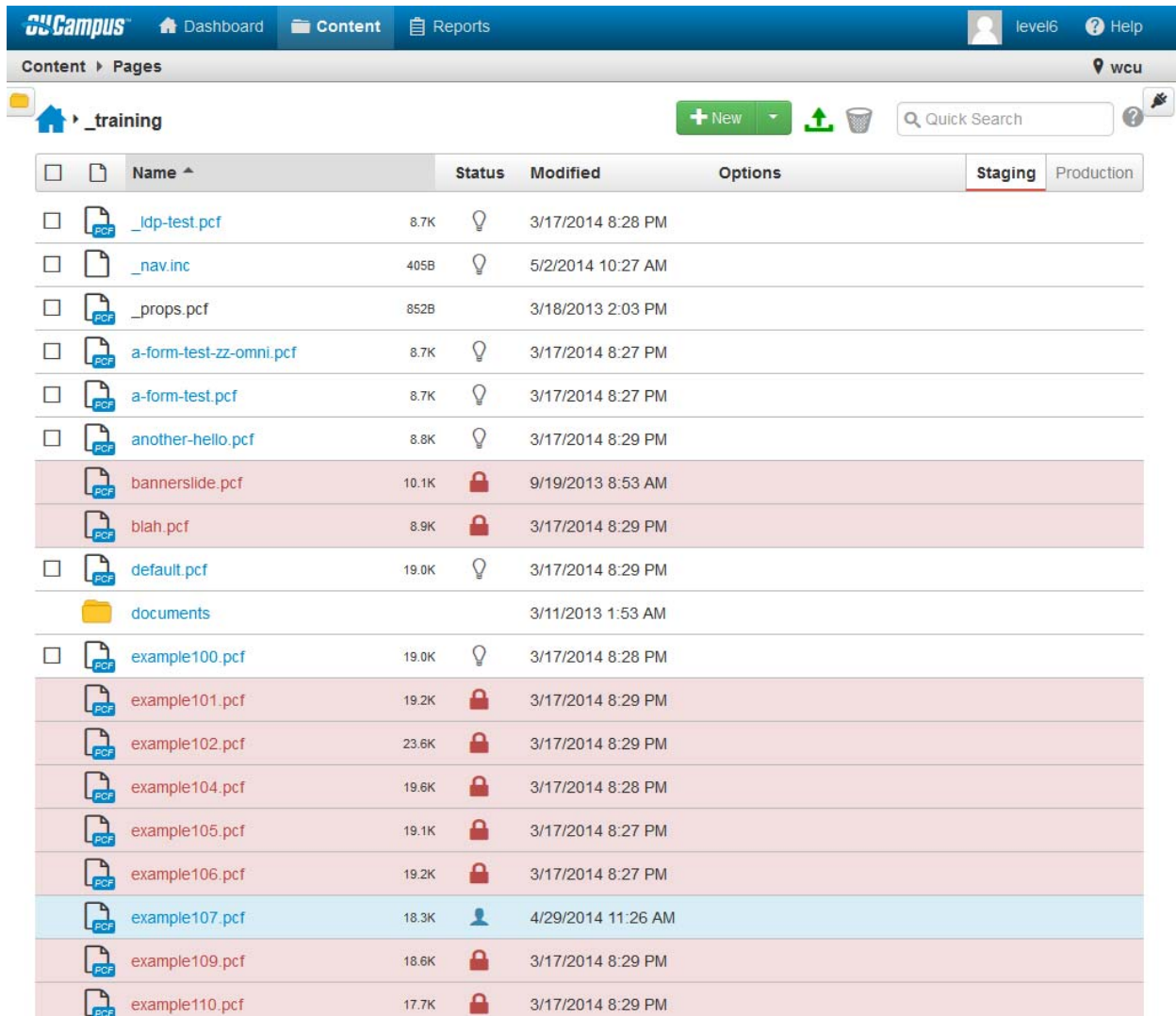
The arrow closes the split screen view and shows just the page. The folder opens the split screen view, showing both the page and folder structure.

Pages View

Clicking the **Pages** link shows you the directory view, expanded. You can either click Content, then Pages, or click the word Pages in the breadcrumb trail at the top of the page.



This opens the full structure view.



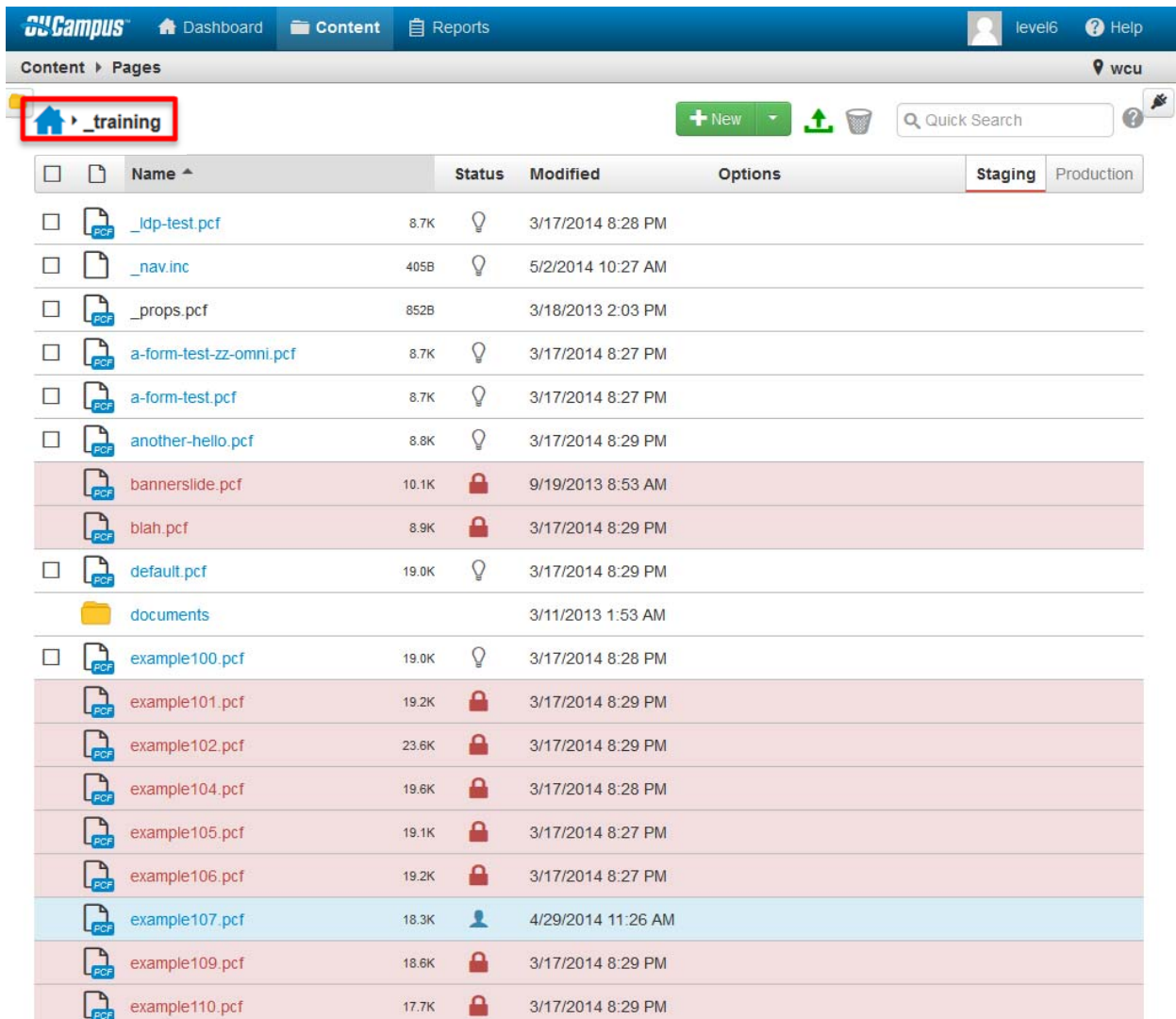
The screenshot shows the 'OU Campus' interface with a breadcrumb trail 'Content > Pages' and a location indicator 'wcu'. The main content area is titled '_training' and contains a table of files. The table has columns for 'Name', 'Status', 'Modified', 'Options', 'Staging', and 'Production'. The file 'example107.pcf' is highlighted in blue, indicating it is the current view.

Name	Status	Modified	Options	Staging	Production
_ldp-test.pcf	8.7K	3/17/2014 8:28 PM	Lightbulb icon		
_nav.inc	405B	5/2/2014 10:27 AM	Lightbulb icon		
_props.pcf	852B	3/18/2013 2:03 PM			
a-form-test-zz-omni.pcf	8.7K	3/17/2014 8:27 PM	Lightbulb icon		
a-form-test.pcf	8.7K	3/17/2014 8:27 PM	Lightbulb icon		
another-hello.pcf	8.8K	3/17/2014 8:29 PM	Lightbulb icon		
bannerslide.pcf	10.1K	9/19/2013 8:53 AM	Red lock icon		
blah.pcf	8.9K	3/17/2014 8:29 PM	Red lock icon		
default.pcf	19.0K	3/17/2014 8:29 PM	Lightbulb icon		
documents		3/11/2013 1:53 AM			
example100.pcf	19.0K	3/17/2014 8:28 PM	Lightbulb icon		
example101.pcf	19.2K	3/17/2014 8:29 PM	Red lock icon		
example102.pcf	23.6K	3/17/2014 8:29 PM	Red lock icon		
example104.pcf	19.6K	3/17/2014 8:28 PM	Red lock icon		
example105.pcf	19.1K	3/17/2014 8:27 PM	Red lock icon		
example106.pcf	19.2K	3/17/2014 8:27 PM	Red lock icon		
example107.pcf	18.3K	4/29/2014 11:26 AM	Person icon		
example109.pcf	18.6K	3/17/2014 8:29 PM	Red lock icon		
example110.pcf	17.7K	3/17/2014 8:29 PM	Red lock icon		

You can use the folder structure found in this view to navigate to the various pages that need to be edited, if you have editing access for those pages.

If access to a particular directory or page has not been granted, the directory or page is displayed as non-hyperlinked, plain, black text.

The breadcrumb trail at the top left is a way to navigate the directory structure. Simply click the link on the directory name or the home button to navigate backwards.



The screenshot shows the OU Campus interface. At the top, there are navigation tabs for 'Dashboard', 'Content', and 'Reports'. The user is logged in as 'level6'. The breadcrumb trail is 'Content > Pages > _training', with the '_training' link highlighted in a red box. Below the breadcrumb, there are buttons for '+ New', upload, and delete, along with a 'Quick Search' field. The main area displays a table of files and folders:

Name	Status	Modified	Options	Staging	Production
_ldp-test.pcf	8.7K	3/17/2014 8:28 PM	Lightbulb icon		
_nav.inc	405B	5/2/2014 10:27 AM	Lightbulb icon		
_props.pcf	852B	3/18/2013 2:03 PM			
a-form-test-zz-omni.pcf	8.7K	3/17/2014 8:27 PM	Lightbulb icon		
a-form-test.pcf	8.7K	3/17/2014 8:27 PM	Lightbulb icon		
another-hello.pcf	8.8K	3/17/2014 8:29 PM	Lightbulb icon		
bannerslide.pcf	10.1K	9/19/2013 8:53 AM	Red lock icon		
blah.pcf	8.9K	3/17/2014 8:29 PM	Red lock icon		
default.pcf	19.0K	3/17/2014 8:29 PM	Lightbulb icon		
documents		3/11/2013 1:53 AM			
example100.pcf	19.0K	3/17/2014 8:28 PM	Lightbulb icon		
example101.pcf	19.2K	3/17/2014 8:29 PM	Red lock icon		
example102.pcf	23.6K	3/17/2014 8:29 PM	Red lock icon		
example104.pcf	19.6K	3/17/2014 8:28 PM	Red lock icon		
example105.pcf	19.1K	3/17/2014 8:27 PM	Red lock icon		
example106.pcf	19.2K	3/17/2014 8:27 PM	Red lock icon		
example107.pcf	18.3K	4/29/2014 11:26 AM	Person icon		
example109.pcf	18.6K	3/17/2014 8:29 PM	Red lock icon		
example110.pcf	17.7K	3/17/2014 8:29 PM	Red lock icon		

Other Ways to Navigate

If you're unsure where you are, and not sure how to get back to the page you want to edit, close the browser window or tab that contains OU Campus. Open a new window or tab, go to the www.wcu.edu site, navigate to the page you wish to edit, and click the DirectEdit link to be logged back in.









Checked Out Pages

Pages are marked as “checked out” when they are locked to a user. Only one person can check out a page at a time. When the page is checked out to a user, no other users, including administrators, can make changes to the page.









Web Services CAN override a checked out page. Any changes made by the user and not saved will be lost.

There are multiple reasons that a page is shown as checked out to a user, and there are different status indicators to make clear why.

In the **Pages** view, the page status indicator is a lightbulb.

<input type="checkbox"/>	 example112.pcf	18.2K		3/17/2014 8:27 PM	
	 example113.pcf	17.0K		3/17/2014 8:29 PM	
<input type="checkbox"/>	 example114.pcf	16.9K		3/17/2014 8:27 PM	 Edit ▾  Review ▾  Publish ▾  File ▾

Page Status Icons Reference

Icon	Description
	An unlit light bulb indicates that content is checked in and can be checked out for editing.
	A lit light bulb indicates that content is checked out to the current user (the individual currently logged into, working in, and viewing OU Campus).
	A red lock indicates that content is checked out to another user. It is possible to hover over the lock and see to whom content is checked out.
	A green calendar indicates that content is checked out to the current user and has been scheduled to publish.
	A red calendar indicates that content is checked out to the another user and has been scheduled to publish.
	The universal no sign, a red circle with a line crossing through it, indicates that content is checked out and is set for a scheduled expiration, which can be a delete, replace, or redirect.
	A blue thumbs up icon indicates that content is awaiting the current user's approval. The content needs to be approved by the current user to be published, or by members of the Publishers group, if so configured.
	A blue person indicates that the content has been sent by the current user to another user for approval. The content is in the approval workflow.

Checking a Page Back In

Pages stay checked out to the user until the user does one of the following:

- Sends the page for approval and publishing.
- Checks the page back into the system by clicking on the lit (yellow) light bulb.

Make sure to do one of these actions for all pages, when you're done working on them.

Note: It is important to check pages in if others in your area may need to review or edit before publishing.

Editing Pages

Template Options

Two WCU branding-approved template options are offered: 2011 (Recommended) and Standard. If your website currently uses the Standard templates and you would like to move to the 2011 templates, please put in a **website refresh service request** with the IT Help Desk:

- Phone: 828-227-7487 (locally) or 866-928-7487 (toll free)
- E-mail : ithelp@wcu.edu
- Online: <http://ithelp.wcu.edu/>

For more information on templates and implementation, visit the WCU Website Standards and Guidelines http://www.wcu.edu/WebFiles/PDFs/WCU_Website_Standards_Guidelines_MASTER.pdf (also available as a link on the right side of <http://cms.wcu.edu>).

2011 Template (Recommended)

The image shows a screenshot of the Western Carolina University Graduate School website. Several callout boxes with arrows point to specific elements on the page:

- Banner Image**: Points to the top banner image of two students looking at a document. Text: "Banner Image - to edit, consult Web Services office".
- Children Navigation**: Points to the left sidebar navigation menu. Text: "Children Navigation".
- Headline**: Points to the "WCU Graduate School" headline. Text: "Headline".
- Upcoming Events**: Points to the "UPCOMING EVENTS" section. Text: "Upcoming Events - feed from R25".
- Body Copy**: Points to the main content area. Text: "Body Copy".
- Contact**: Points to the "CONTACT US" section. Text: "Contact".
- Related Information**: Points to the "RELATED INFORMATION" section. Text: "Related Information".
- News**: Points to the "GRADUATE SCHOOL NEWS" section. Text: "News - feed from WCU news".

The website layout includes a search bar, navigation menu (About WCU, Admissions, Academics, Library, Student Life, Athletics, News, Events, Giving to WCU), a sidebar with "Prospective Graduate Students" and "Current Graduate Students" links, a main content area with "APPLY NOW" and "TUITION & FEES" buttons, and a right sidebar with "UPCOMING EVENTS" and "RELATED INFORMATION".

Standard Template

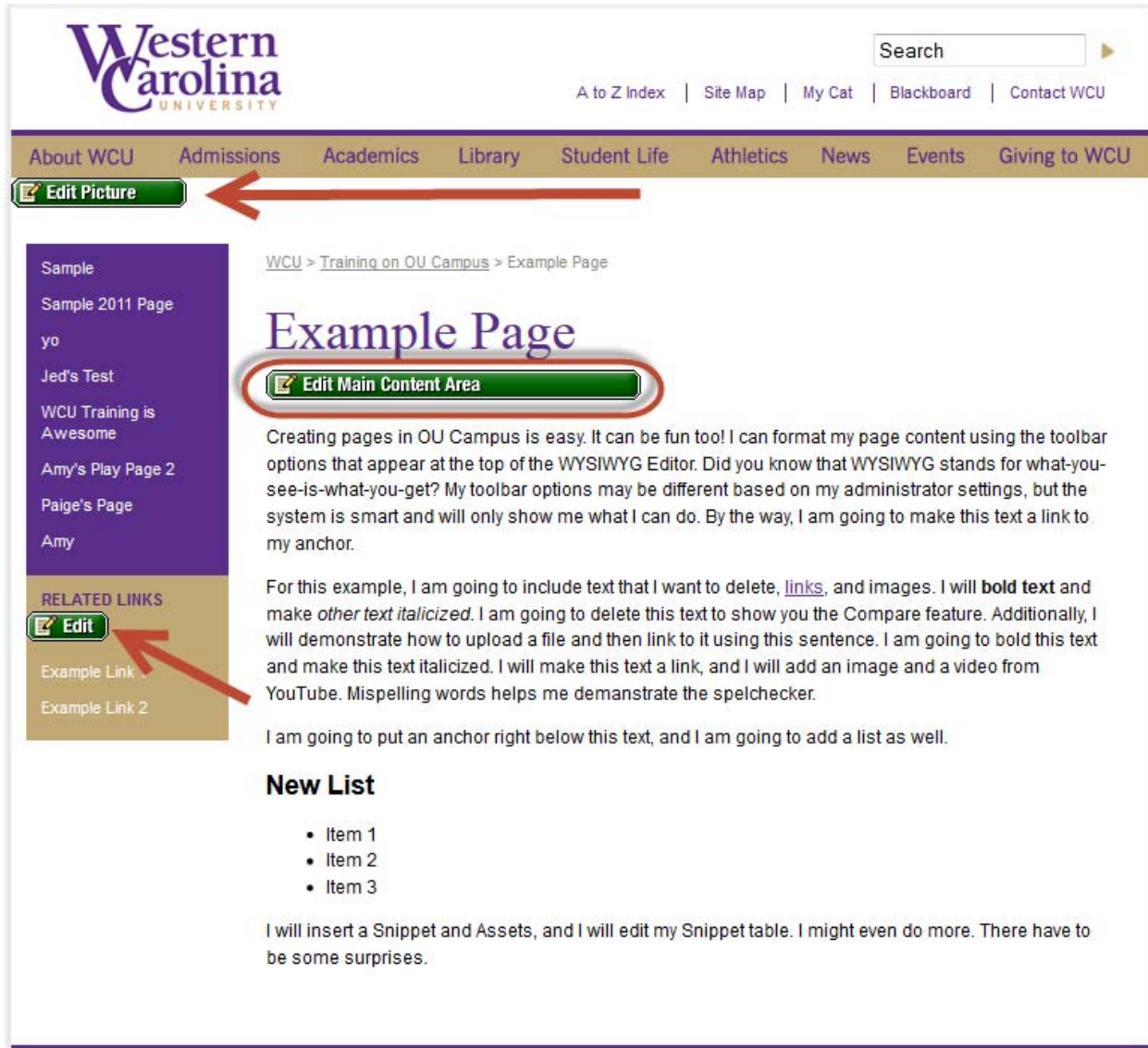
The screenshot displays the Western Carolina University website's standard template. At the top left is the university logo. To the right is a search bar and a navigation menu with links: A to Z Index, Site Map, My Cat, WebCAT, and Contact WCU. Below this is a horizontal menu with categories: About WCU, Admissions, Academics, Library, Student Life, Athletics, News, Events, and Giving to WCU. A banner image area contains four photos of students in various settings, with a callout box pointing to the first image that reads: "Banner Image - to edit, consult Web Services Office".

The main content area features a breadcrumb trail: Home > Academics. The main heading is "Academics", with a callout box pointing to it that says "Headline". Below the heading is a paragraph of text: "Every year, more than 9,000 students find themselves in our classrooms. You can too." A callout box points to this text that says "Body Copy". To the left of the main content is a vertical navigation menu with a callout box pointing to it that says "Children Navigation". To the right is a "College Portrait" sidebar with accreditation information and contact details, with a callout box pointing to it that says "Call Out".

At the bottom left, there is a "RELATED LINKS" section with a callout box pointing to it that says "Related Links Navigation". The page concludes with a partial sentence: "Maybe you've already got your path mapped out, or maybe you're taking".

After checking out the page, edit buttons show the editable regions. Only areas that are available to be edited are shown with a button.

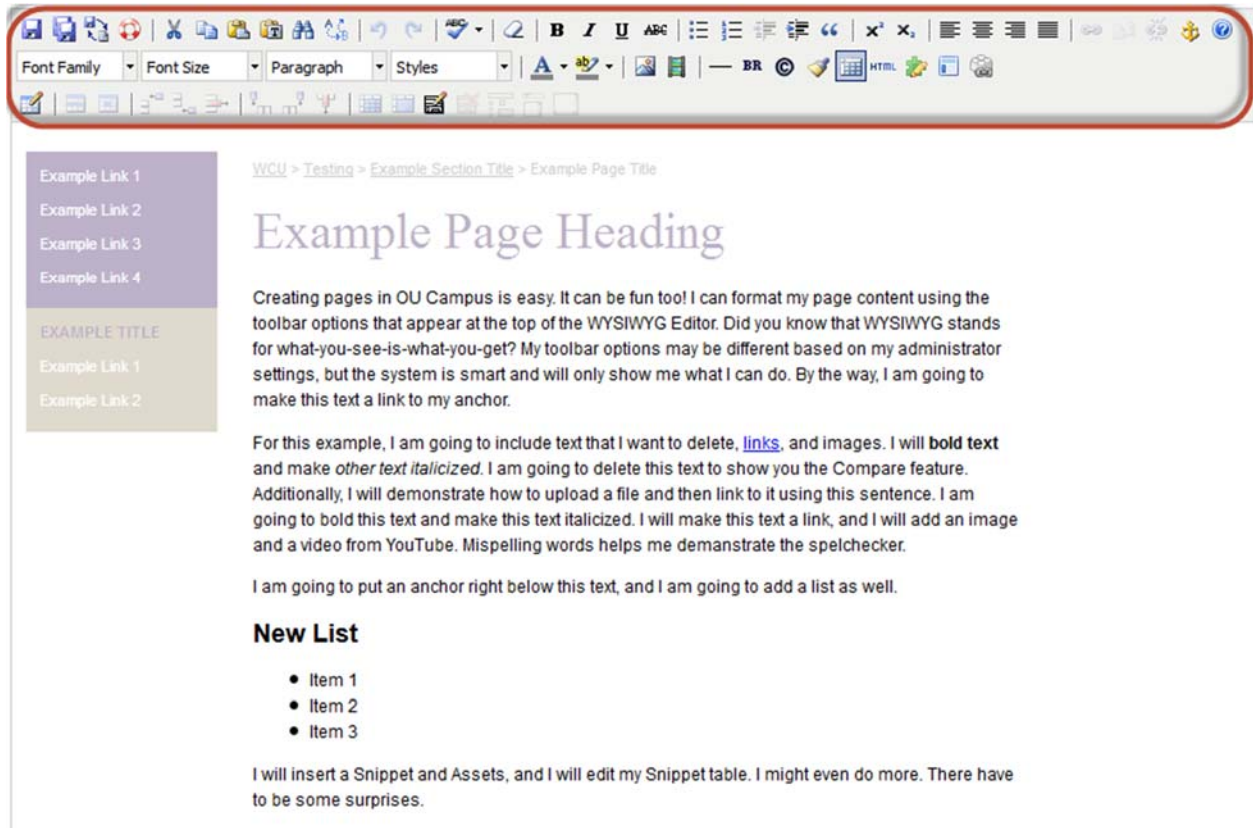
Click the button above the region in which editing should occur. This opens the **WYSIWYG (What You See Is What You Get) Editor**.



WYSIWYG Editor

The WYSIWYG (What You See Is What You Get) Editor contains all the tools necessary to edit the page.

The WYSIWYG Editor includes basic editing functions, such as those found in Microsoft Word[®]. This document reviews some of the common functions, as well as provides details for the more advanced features.




Note: The template design includes an image in the background that helps present a more accurate rendering of how the content will appear on the page, but it may not be reflective of what the current page actually looks like both in terms of the content on the page and possible widgets that may have been turned on or off. It is meant simply for visualization purposes and to help understand how the content will actually be laid out on the page. Once the content has been saved, an actual view of the configured page can be seen using the **Preview** mode.

WYSIWYG Toolbar Functions

For more details on the various toolbar icons, visit the OmniUpdate Support site:

<http://support.omniupdate.com/oucampus10/pages/wysiwyg/toolbar.html>

Save

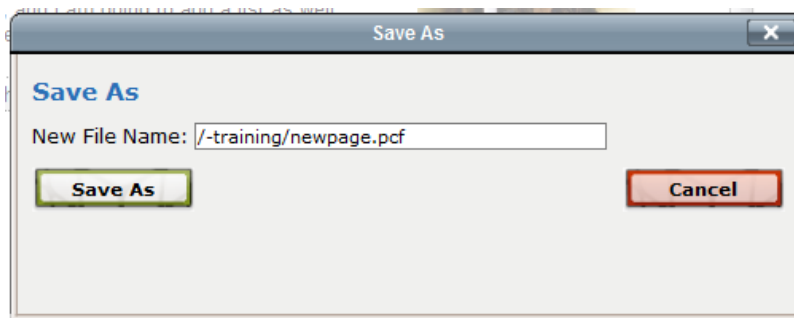
 The **Save** icon allows the user to save the changes that have been made to the page. Using the **Save** icon will also close the WYSIWYG Editor and take the user to a preview of the page. If the user desires to save-in-place while continuing to edit, simply use the keyboard shortcut (CTRL+S for Windows and CMD+S for Mac).

Save As



The **Save As** icon allows the user to save the page with a new name, essentially creating a copy of the page. The new page can then be modified and published independently of the original file.

Click the **Save As** icon and provide the new name in the **New File Name** field. Change only the name of the page, but **leave the extension of .pcf in place. This is extremely important.** If any other extension is used, the page will not render as the header, footer, and styling will not be included. The page path can be changed as well.



NOTE: This option does NOT apply the proper access settings to the page. They will need to be edited.

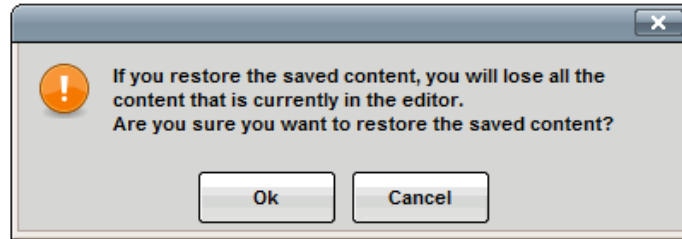
Auto-Draft Icon



The lifesaver icon represents the **Auto-Draft** feature. Once a user begins entering content within the editable region, the **Auto-Draft** creates a backup on the local workstation in the browser's cache or Internet files approximately every minute. The backup is generally available for up to 24 hours, but it is contingent on the user's browser settings.

If the browser shuts down unexpectedly, Internet connectivity is lost prior to the content being saved, or if power is lost, content can be retrieved by following the steps below:

1. Open the same browser on the same workstation that was being used to edit the page. For example, if the page was being edited in Mozilla Firefox when the connection was lost, the **Auto-Draft** retrieval must be completed in Firefox as well, and on the same local system.
2. Navigate to the page that was being edited.
3. Access OU Campus via the DirectEdit link and log in.
4. Click into the editable region that was being edited prior to the loss of connection.
5. *Before entering any content into the page*, click on the **Auto-Draft** icon.
6. Click **OK** on the pop-up.



7. The saved content is restored.

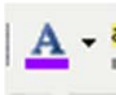
Paste Options

You will paste in only plain text, removing all other formatting.

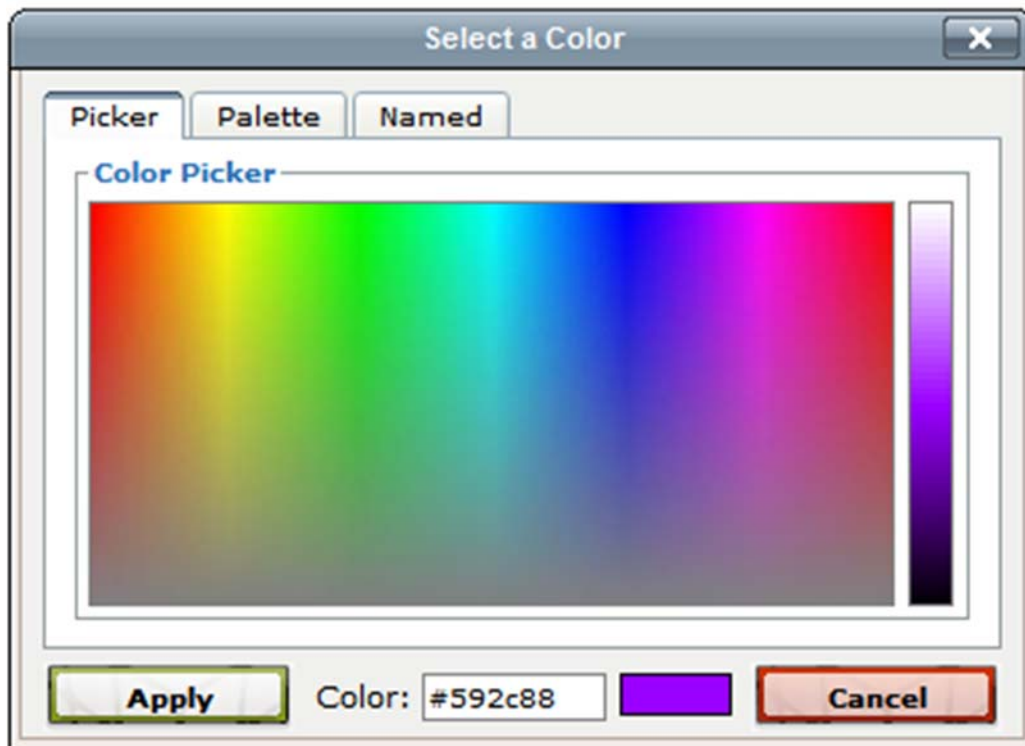
Text Colors

The official WCU colors are purple (#592c88) and gold (#c1a875). You may also use red (#ff0000) as an accent to indicate urgency.

1. Highlight the text you wish to color.
2. Click the **Select Text Color Button**.



3. At the bottom of the dropdown of colors, select **More Colors**.

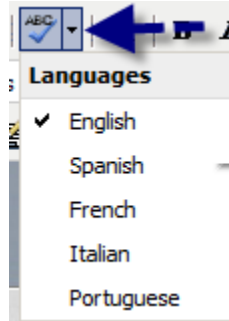


4. In the box at the bottom of the window, next to **Color:** enter the color code for purple, gold, or red. Click **Apply**.

Spell Checker



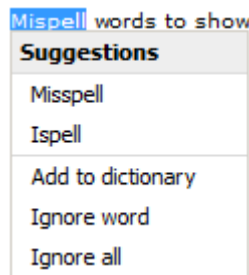
The spell checker can be activated by clicking on the icon (see left image). The default dictionary is in English.



Misspelled words are identified with a wavy, red line.



To fix the misspelled word, simply click on it. This displays a list of available options. Select the appropriately spelled word, ignore the word, or add the word to the dictionary.



Keep in mind that the browser's spell checker may be active and marking words as misspelled while the page is being edited. However, only OU Campus' spell checker references the OU Campus custom dictionary. To help 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 the OU Campus spell checker is being used.

Links and Linking

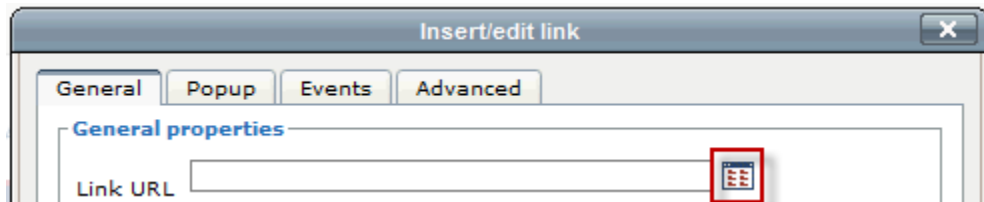


Links are created by highlighting text or an image and clicking the **Insert/Edit Link** icon. The Insert/Edit Link icon is dimmed until the text or image to be hyperlinked is selected. Links can point to internal web links, external websites not maintained in OU Campus, or other pages within OU Campus. The Insert/Edit Link icon can also be used to create links to files, such as PDFs.

Inserting a Link to Another OU Campus Managed WCU Webpage

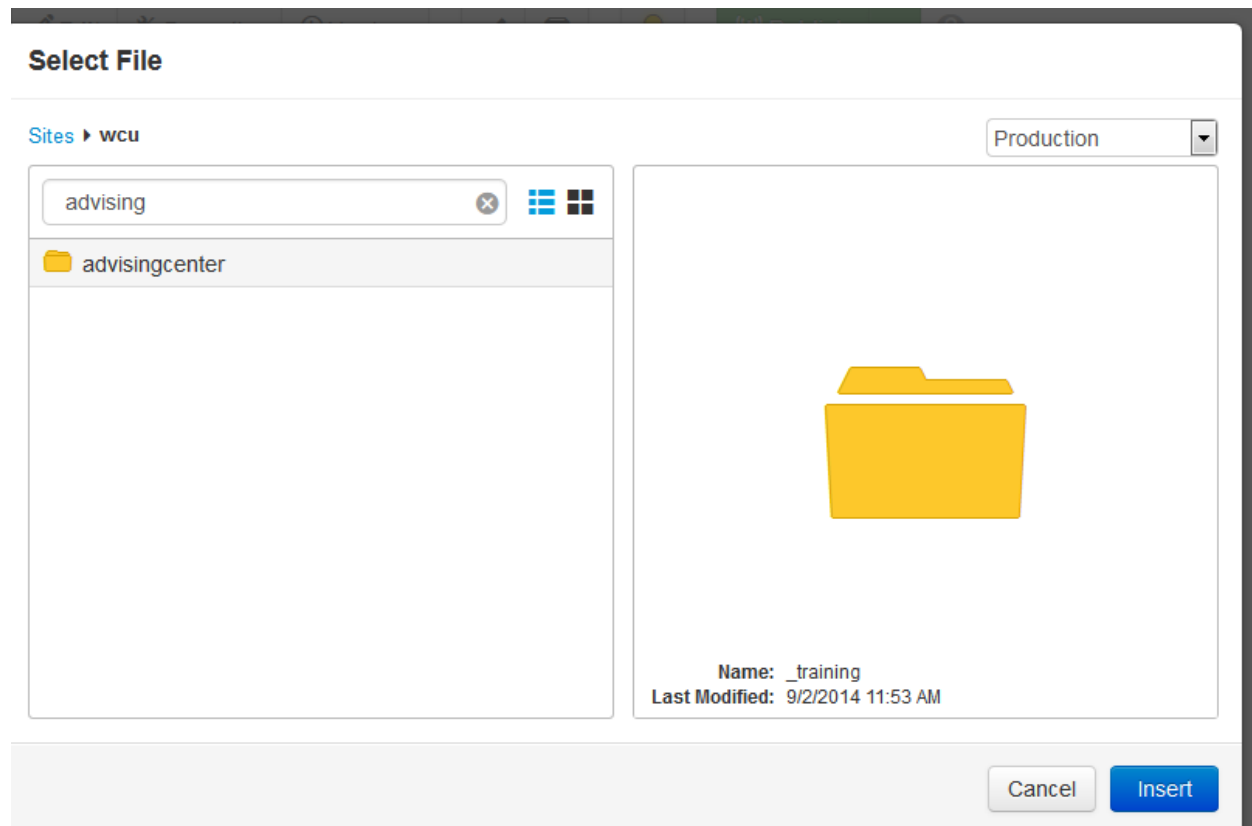
A link to a page or file within OU Campus can be inserted and it works within a site or across sites within an account. In this case, the page should be browsed to so that the Dependency tag is inserted rather than a path or URL.

1. Highlight the text or image to link.
2. Click the **Insert/Edit Link** icon.
3. Click on the **Browse** button. This opens the **File Browser**.

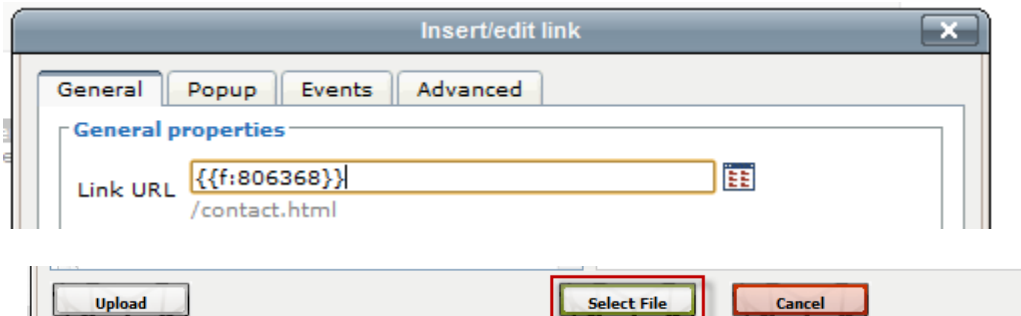


4. Find the file to which the link should be created.
5. If the desired page is not in the selected directory, use the breadcrumb at the top of the page and the folders within the window to navigate to the desired page.

NOTE: There is a FILTER box at the top. You can use this to search for the name of a page or folder.



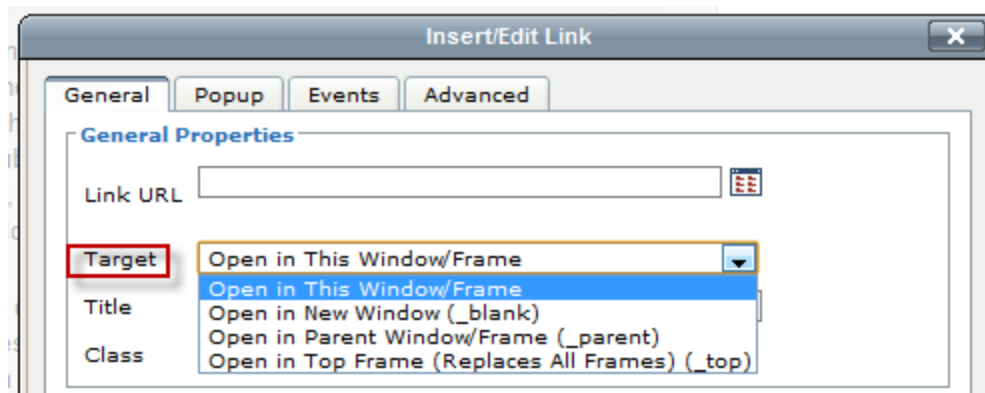
6. Select the page.
7. Click **Insert**.
8. A OU Campus tag is shown instead of the URL.



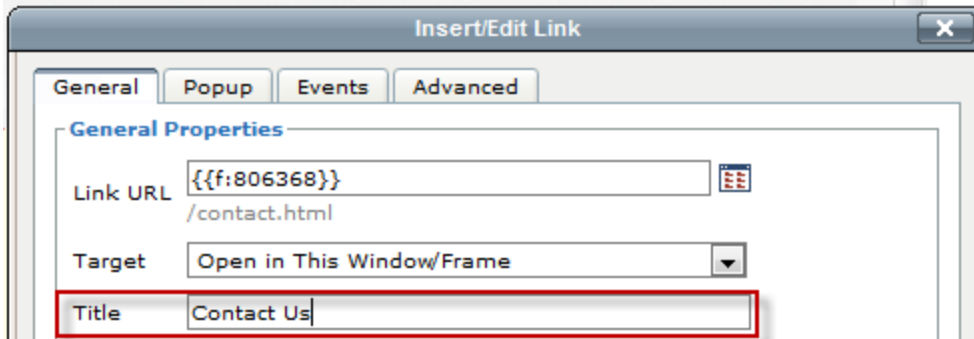
9. Select the **Target**.

As a general rule of thumb, when inserting a link to another page on WCU's website, the link should open in the same window. When inserting a link to a page outside WCU's 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 WCU's website: **Open in This Window/Frame**
- Linking to pages on another site or binary files: **Open in New Window (_blank)**



10. Enter the **Title**. It is both valuable and important to populate the **Title** field as this is used by screen readers and helps keep the site in compliance with accessibility compliance standards.



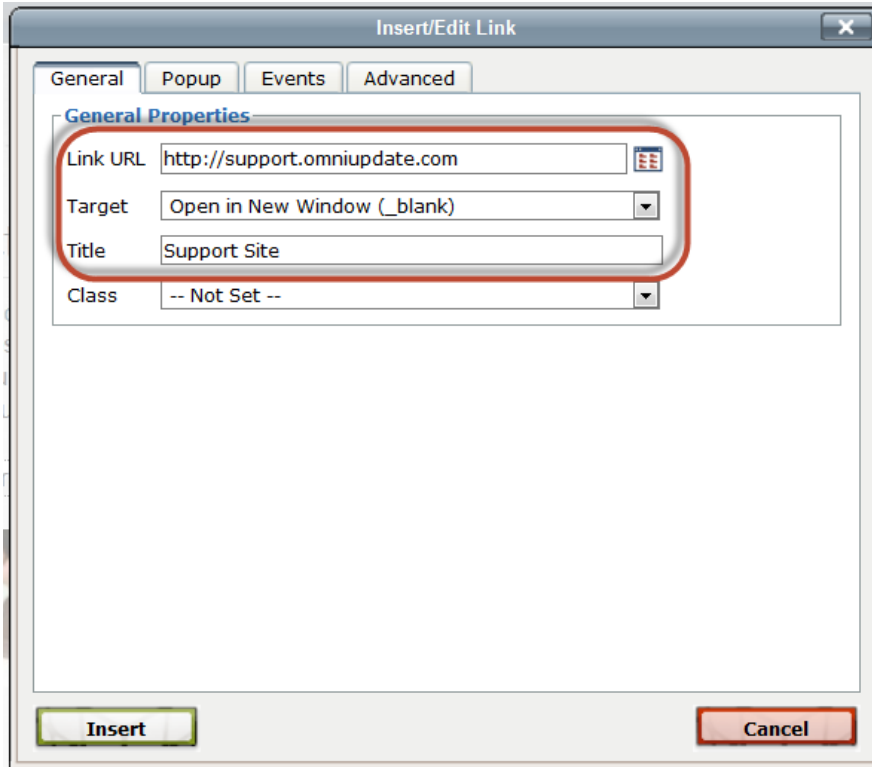
11. **Class:** Can be ignored at this time.

12. Click **Insert**.

NOTE: DO NOT navigate to wcu.edu and then copy and paste the URL of that page for internal links. While this may save you time from navigating in the system, it doesn't allow the system to track the links and therefore can result in broken links if the page/ content changes.

Inserting a Link to an External Site

1. Highlight the text or image to link.
2. Click the **Insert/Edit Link** icon.
3. Enter the link information, including **Link URL**, **Target**, and **Title**. Use the full URL of the page or site formatting with http:// such as – <http://www.cnn.com> – not cnn.com or www.cnn.com.
4. Click **Insert**.
5. Enter the **Title**. It is both valuable and important to populate the **Title** field as this is used by screen readers and helps keep the site in compliance with accessibility compliance standards.



6. **Class:** Can be ignored at this time.

Inserting a link to a File

For linking to a PDF, Word document, Excel spreadsheet or other type of file.

Recommendation for naming files:

Instructions

Use your college/dept./program name or acronym first. Use explanatory words for the rest.

Time-specific files: Use a two-word description, separated by hyphens, with a two- (year), four- (month/year) or six-digit (day/month/year) date at the end.

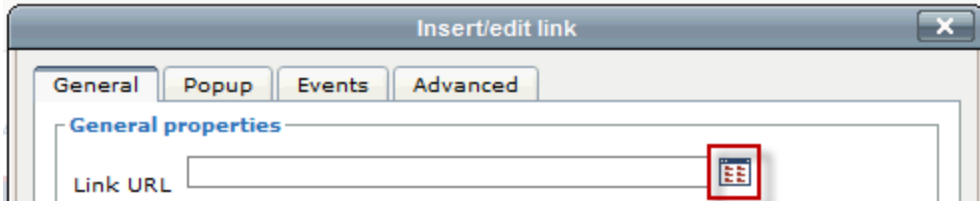
Examples

- Library-org_chart.xls
- CEAP-grad-requirements.doc
- IT-org-chart.ppt

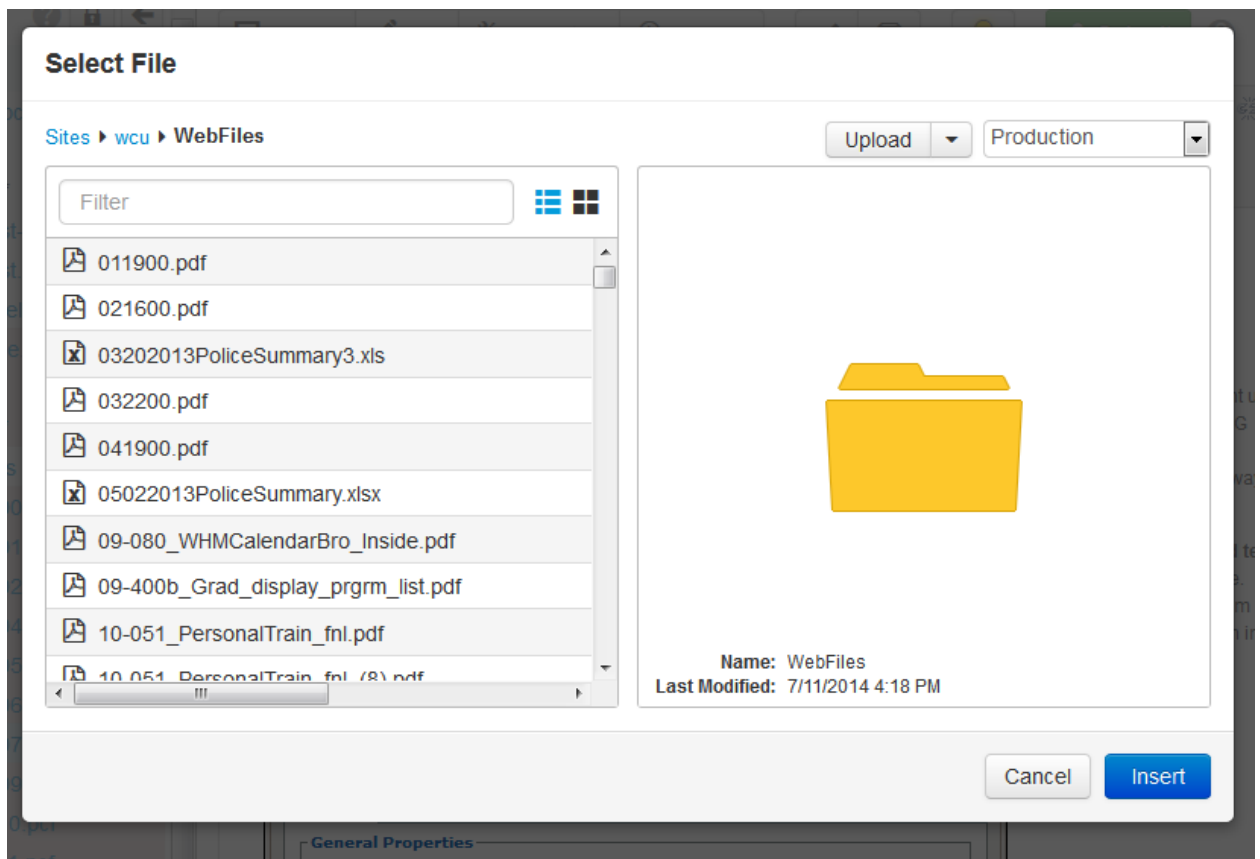
- My-document-07.doc
- My-document-0307.xls
- My-document-200307.ppt

Is the file already on the server?

1. Highlight the text or image to link.
2. Click the **Insert/Edit Link** icon.
3. Click on the **Browse** button. This opens the **File Browser**.



4. Navigate to the file. It will be in the WCU/WebFiles folder. To get to the WebFiles folder, click the link for WCU at the top left of the window. Scroll down to the bottom where WebFiles is located. This will take a few seconds to load as it is a very large list of files.
5. Scroll down to the **WebFiles** folder and double-click to open.

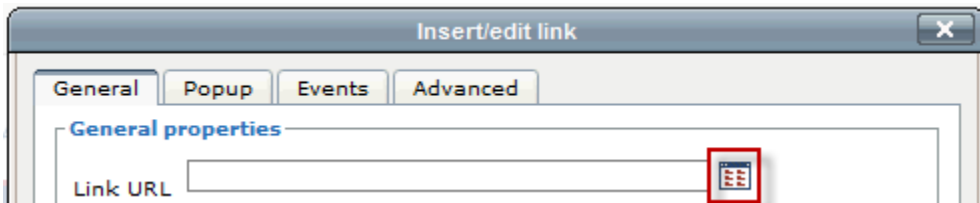


6. Click on the file name to select the file.
7. Click the **Insert button**. The link ID number is now in the Link URL field.
8. Click Insert.

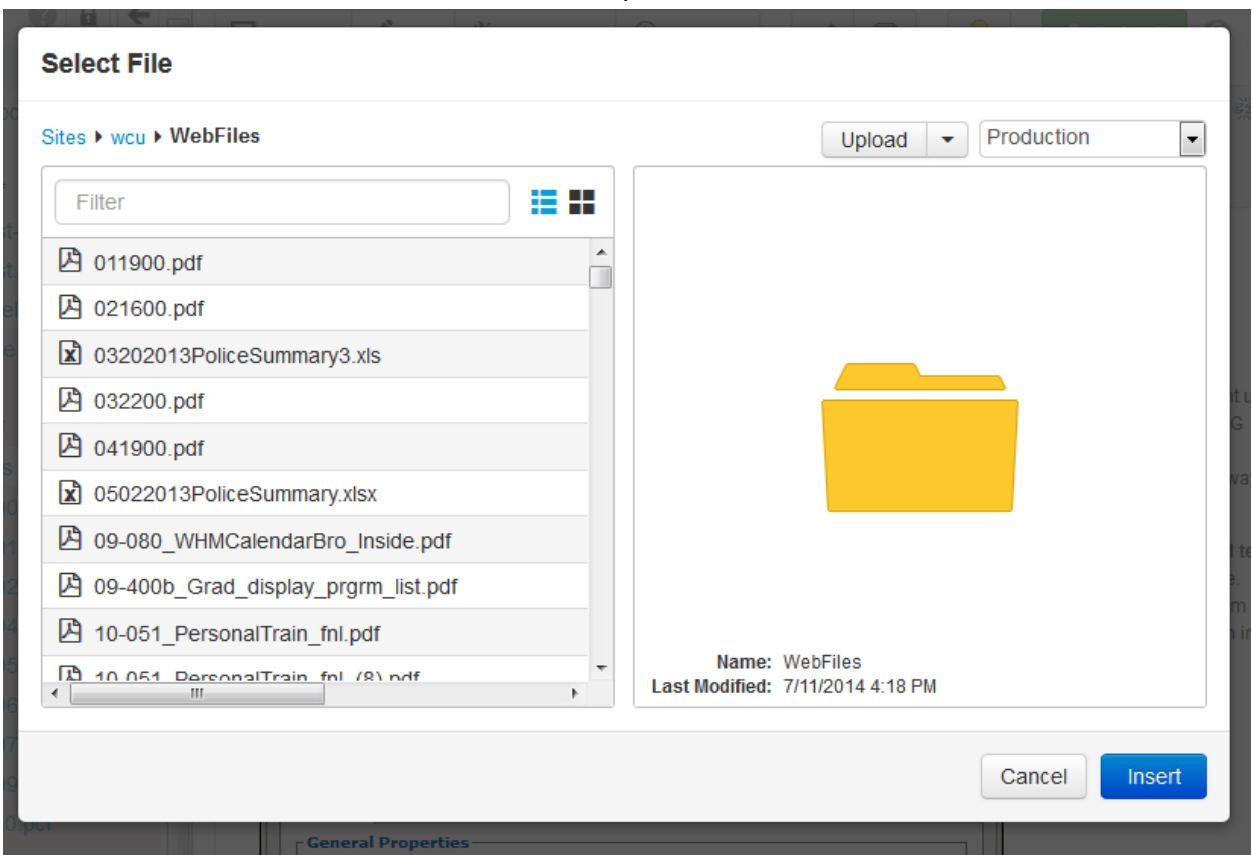
Is the file NOT on the server already?

NOTE: Zip files cannot be uploaded in this fashion. Follow the directions for “Do you want to REPLACE/ OVERWRITE the file on the server?” (below) and don’t check the box next to overwrite.

1. Highlight the text or image to link.
2. Click the **Insert/Edit Link** icon.
3. Click on the **Browse** button. This opens the **File Browser**.

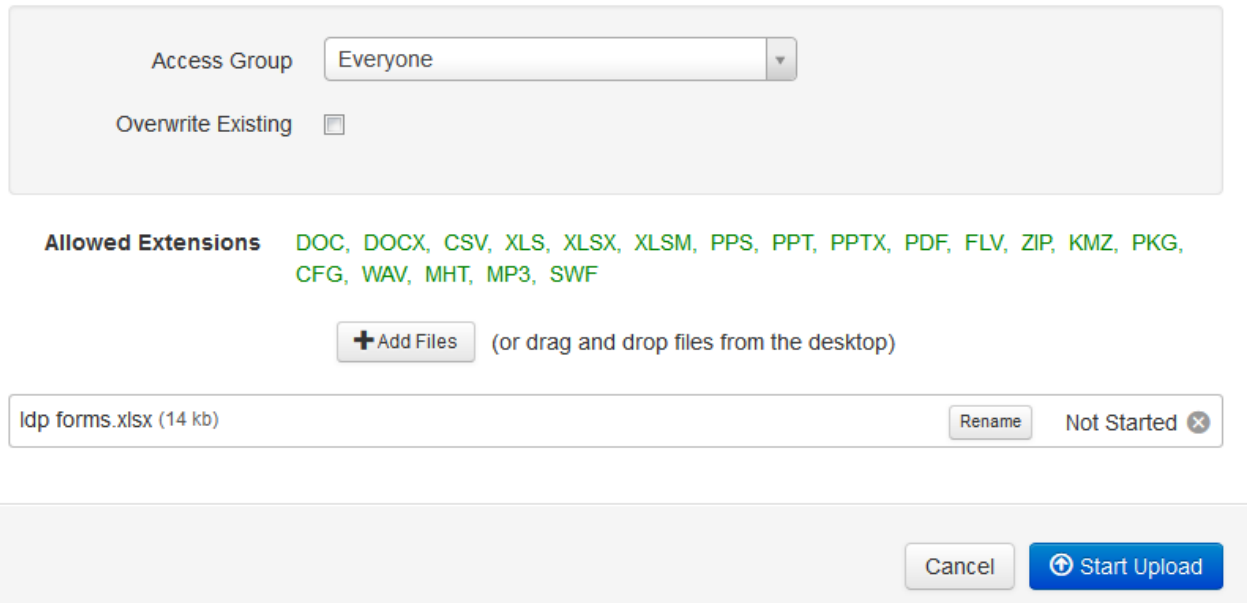


4. Navigate to the file. It will be in the WCU/WebFiles folder. To get to the WebFiles folder, click the link for WCU next to the house icon.
5. Type the word webfiles into the filter box.
6. Select the WebFiles folder and double-click to open.



7. Click the **Upload Button**.
8. In the File Upload window, leave the Access Group as Everyone.
9. Click the **Add Files Button** or Drag and Drop a file from your desktop.
10. Locate the file on your computer.
11. Select the file by clicking on it and click the **Open Button**.

Upload to /WebFiles



Access Group

Overwrite Existing

Allowed Extensions DOC, DOCX, CSV, XLS, XLSX, XLSM, PPS, PPT, PPTX, PDF, FLV, ZIP, KMZ, PKG, CFG, WAV, MHT, MP3, SWF

(or drag and drop files from the desktop)

ldp forms.xlsx (14 kb)

12. Files must be named with only a-z letters, numbers, and hyphens – no spaces or underscores. Be sure to include the file type ending (the .pdf or .doc or whatever ending your file should have). If you need to rename the file, click the **rename button**.
13. Click the **Start Upload Button**.
14. You will receive a success message of **“Done”**.
15. Navigate to the file. It will be in the WCU/WebFiles folder, or a subfolder, where you uploaded it.
16. You’re returned to the WebFiles folder. Click on the file name to select the file.
17. Click the **Insert button**. The link ID number is now in the Link URL field.
18. Click **Insert**.

Do you want to REPLACE/ OVERWRITE the file on the server?


****This ONLY works for files in the WebFiles folder, and its subfolders (PDFs, Word Docs, Excel). If your file is NOT in the WebFiles folder, contact Web Services to replace it.*

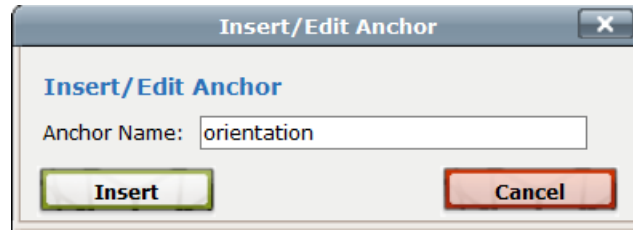
1. Follow the directions above for adding a file to the server – EXCEPT – between steps 8 and 9 - click the Overwrite Existing box.

Inserting Anchors

An anchor can be thought of as a bookmark on a page. Once the anchor has been added, a link can be created to jump right to it.

To Create an Anchor

1. Place the cursor where the anchor is desired, or select the text or image for the anchor.
2. Click the **Insert/Edit Anchor** button.  This displays a dialog box.

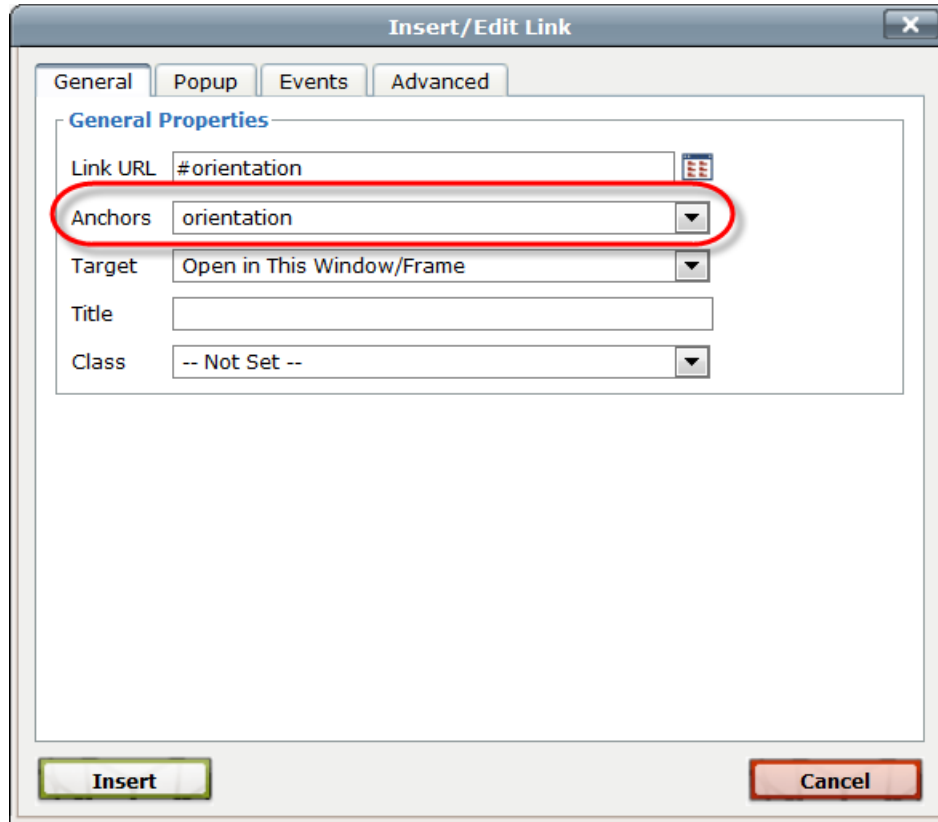


3. Enter the name of the anchor.
4. Click **Insert**. This adds the anchor to the HTML. In the WYSIWYG view a small anchor icon represents the named reference.

Note: More than one anchor can be added to a page, but each should have a unique name. Best practices for anchors names include using lower-case letters, numbers, and hyphens. An anchor cannot start with a number or the symbols.

To Link to an Anchor

1. After creating the anchor, select the text that will be linked.
2. Select the **Insert/Edit Link**.
3. For the **Anchors** field, use the drop-down to select the anchor from the list.



Note: The Anchors drop-down is only shown if the anchor is in the same editable region as the link being created. If the anchor is in a different editable region, when creating the link enter # and the anchor name in the **Link URL** field. If the anchor is on a different page, browse for the page and add # and the anchor name after the path or Dependency tag.

Note: You **cannot** test anchor links in the preview of the page – it will show an error. You can only see the working anchors on the published page.

Editing a Link

To edit a link that has been inserted on a page, simply click on the link, and then click on the **Insert/Edit Link** icon. Follow the steps outlined above to modify the link.

Deleting a Link

To delete a link, click on the link, and click the Unlink icon .

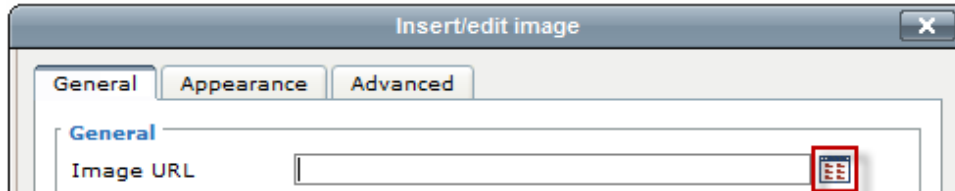
Images

The insert images option provides an easy way to include images on the web page. It is possible to select from images that have already been uploaded to the production server or users can upload images to the production server.

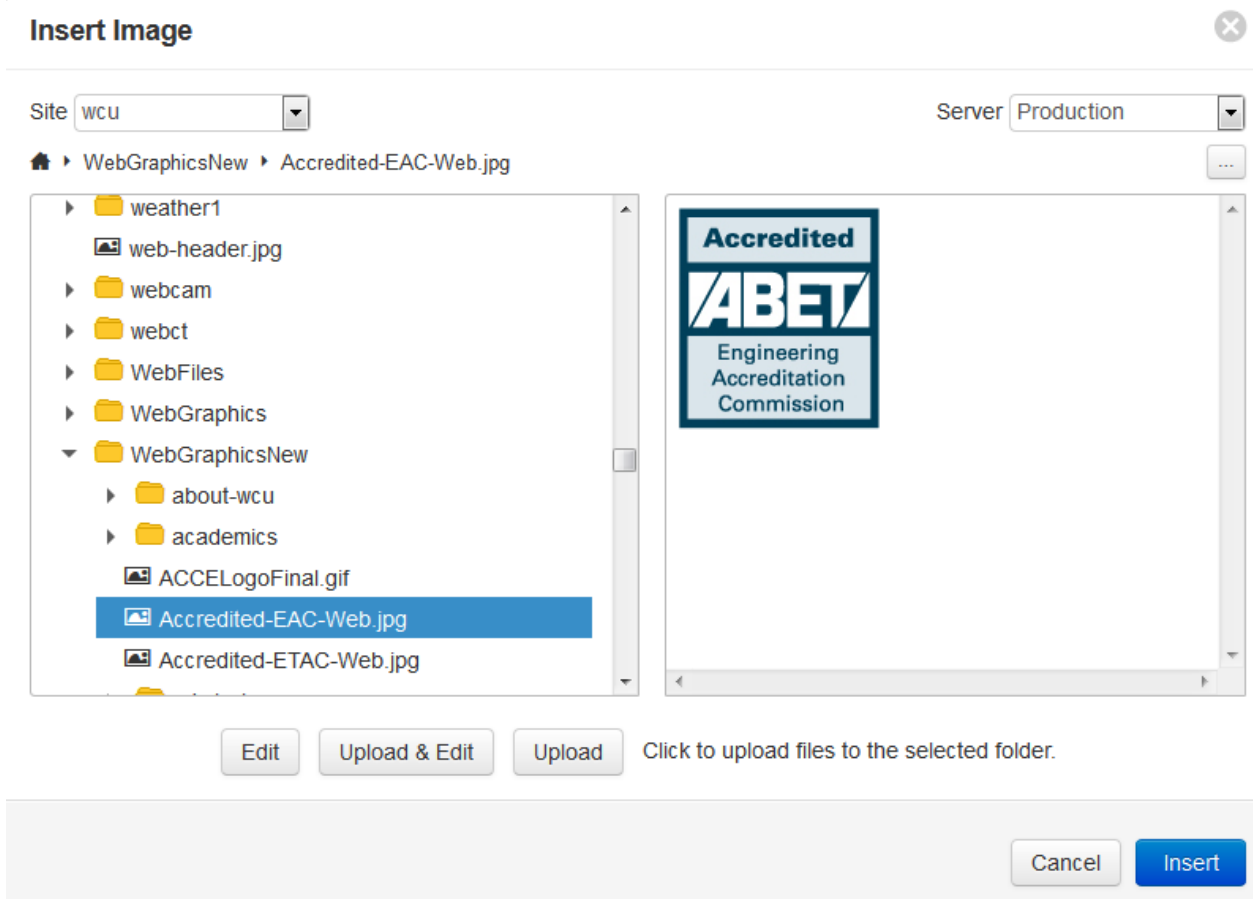
The system is set up to place you automatically in the appropriate folder for images.

Inserting Images already on the server

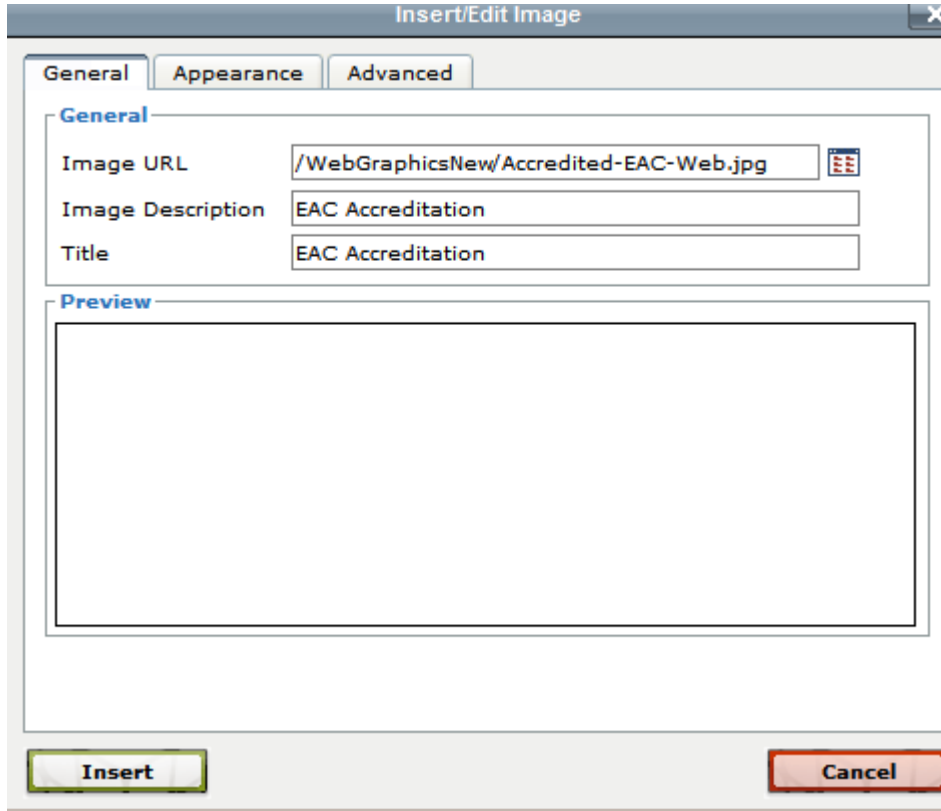
- 1) Click on the **Insert/Edit Image** icon: .
- 2) Click on the browse button next to the **Image URL** field and find the image to be included.



- 3) **In the top right of the screen – next to Server – choose Production**
- 4) Images are located in one of two places:
 - i) PRIOR to 4/29/13 - located in the **WebGraphics** folder and its subfolders.
 - ii) AFTER 4/29/13 – located in the **WebGraphicsNew** folder and its subfolders.
- 5) Navigate to and click on the desired image.
- 6) Click **Insert**.



- 7) After selecting the image, add an **Image Description** and **copy the description to Title**. This is required and is used by screen readers for accessibility standards compliance.

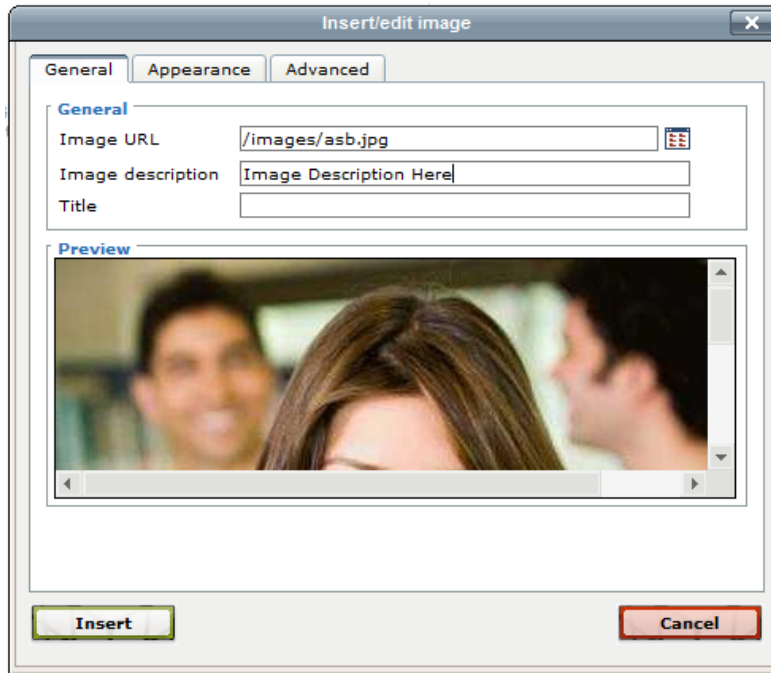


- 8) Specify any other options and click **Insert**. Other options are available on the **Appearance** tab to control specific visual characteristics for the image.

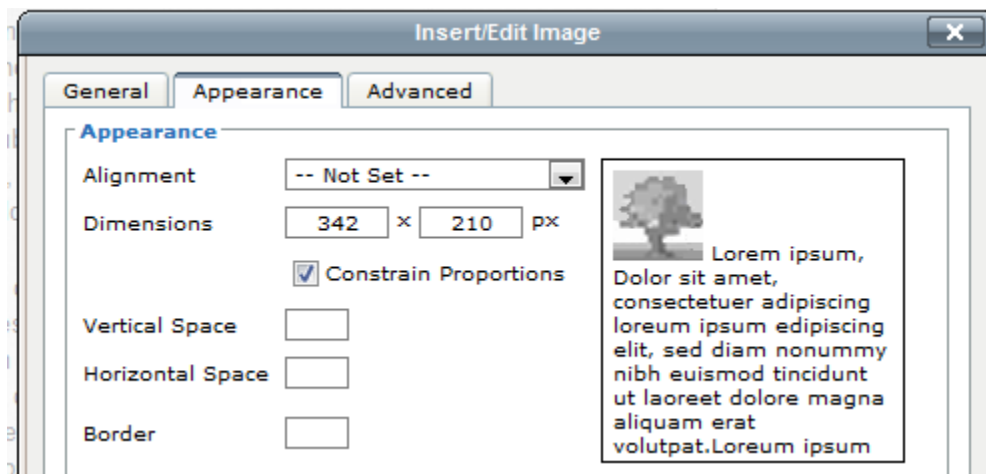
Setting	Description
Alignment	Includes several alignment options for images. A preview of the alignment can be seen on the right. Use LEFT and RIGHT to align the image with the surrounding text.
Dimensions	Can be used to change the size of an image. Use with Constrain Proportions to ensure that the length of each side is increased or reduced proportionally.
Constrain Proportions	Use to ensure that the length of each side is increased or reduced proportionally.
Vertical Space	Adds a top and bottom margin to the box object. By default the amount is measured in pixels. If 20 is entered, a 20px margin is added to both the top and the bottom of the image. We recommend entering 5.
Horizontal Space	Adds a left and right margin to the box object. By default the amount is measured in pixels. If 20 is entered, a 20px margin is added to both the left and the right of the image.

We recommend entering 5.	
Border	Adds a border to the image and is measured in pixels. Our stylesheet will override this setting. You can ignore this field.
Class	You can ignore this field.
Style	You can ignore this field.

Insert/Edit Image General Tab



Insert/Edit Image > Appearance Tab



New Image Size and Formatting

Images on the web need to be sized and formatted for best viewing results. DO NOT upload raw images from a camera as they will cause poor loading performance on the web due to size.

When uploading images, keep in mind that the image should be:

- 72 dpi
- No larger than 50 kilobytes in file size

Banner Images

Banners are comprised of an image plus brief text. We work with Creative Services to have these banners created for use in OU Campus.

Email the Help Desk to request a banner/multiple banners. Attach image(s) you'd like to use, if you have them. If you don't have an image, describe the type of imagery you'd like to see in the banner. Creative Services can help schedule a photo shoot and/or look through images already existing on campus.

Include the wording you'd like for each banner. This could be a single word, a phrase, or a few words.

Examples:

For Admissions - Climb to New Heights / choose your path

For College of Business – Business Ready / It's not business as usual

For Campus Rec – Play the Lift / with Intramural Sports

Requests are handled on a first come, first served basis. Turnaround time is about 4-6 weeks.

After you've approved the banner/s that Creative Services produces, they'll send it/them to us and we'll upload for you.

Please remember, you can have a single banner that displays permanently on the page or a group of banners which allows a different banner to load each time the page loads.

Image Sizing for Within the Body Copy of a Page

The following specifications are for maximum widths; images may be any height.

2011 Templates:

3 columns – 360 pixels

2 columns – 540 pixels

1 column – 710 pixels

Standard Templates:

3 columns – 385 pixels

2 columns – 560 pixels

1 column – 710 pixels

Recommendations for Image Naming

Instructions

Examples

Use your college/dept./program name or acronym first. Use explanatory words for the rest.

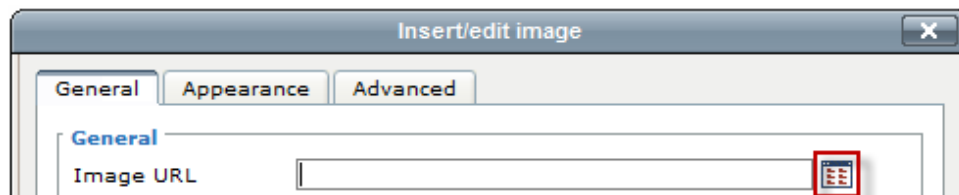
Headshots: Use the lastname-firstname.jpg naming convention.

- Library-building-outside.jpg
- CEAP-students-classroom.gif
- Smith-John.jpg
- McEnroe-Hamish.jpg

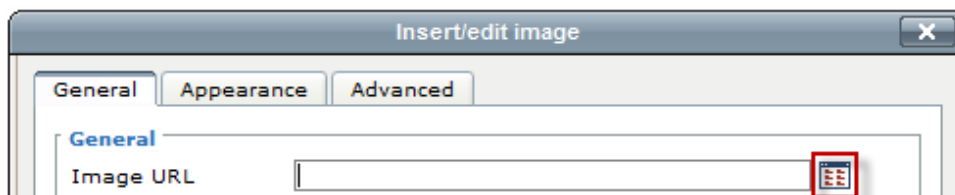
Uploading New Images

If the necessary image has not already been uploaded to the production server, it can be uploaded through the file browser.

1. Click the **Browse** button.



2. Scroll down to the **WebGraphicsNew** folder and double-click to open.
3. Select the appropriate subfolder. Images should go into the subfolder that matches the location of the page on which they are used. Example – an image used in a page under academics should be located in the academics subfolder.
4. Click the **Upload Button**.
5. In the File Upload window, click the **Browse Button**.



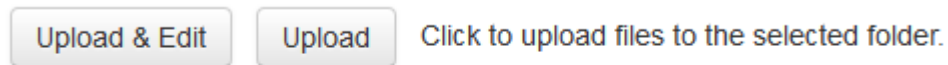
6. Browse for the file you want to upload by clicking **Add Files** or dragging and dropping a file from your desktop.
7. Files must be named with only a-z letters, numbers, and hyphens – no spaces or underscores. Be sure to include the file type ending (the .jpg or .gif or whatever ending your file should have).
8. Click the **Start Upload Button**.
9. You will receive a success message. Click the **Okay Button**.
10. Navigate to the file. It will be in a subfolder under the WCU/WebGraphicsNew folder. Click the **wcu** link under the words File Browser. This will take a few seconds to load as it is a very large list of files.
11. Scroll down to the **WebGraphicsNew** folder and double-click to open.
12. Double-click the appropriate subfolder to open it.
13. Click on the file name to select the file.
14. Click the **Select File button**. The link URL is now in the Link URL field.

15. Click Insert.







Editing Images

This should be used to make small changes to an image. For best results – we recommend resizing and formatting OUTSIDE OU in an image editing tool such as Photoshop.

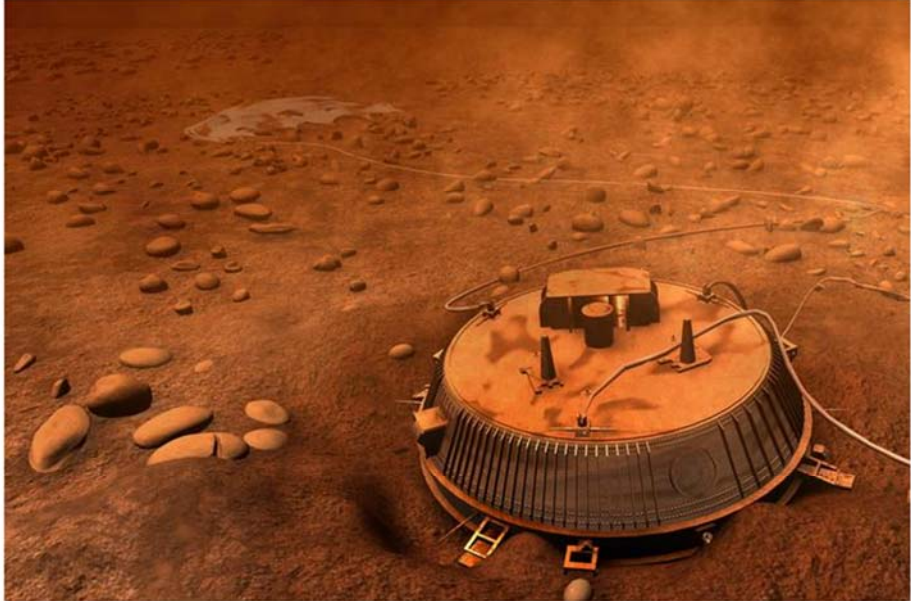
To edit an image while uploading it, use the **Upload & Edit** button at the base of the insert image window. Otherwise, simply use the **Edit Image** button after selecting an image already on the server. Editing the image on upload, functions the same as editing the image after the fact, but creates a copy of the image.



1. Select the image to be edited.
2. Click the **Upload & Edit button**.
3. Make the necessary changes – use Resize, Crop, Rotate, Zoom.

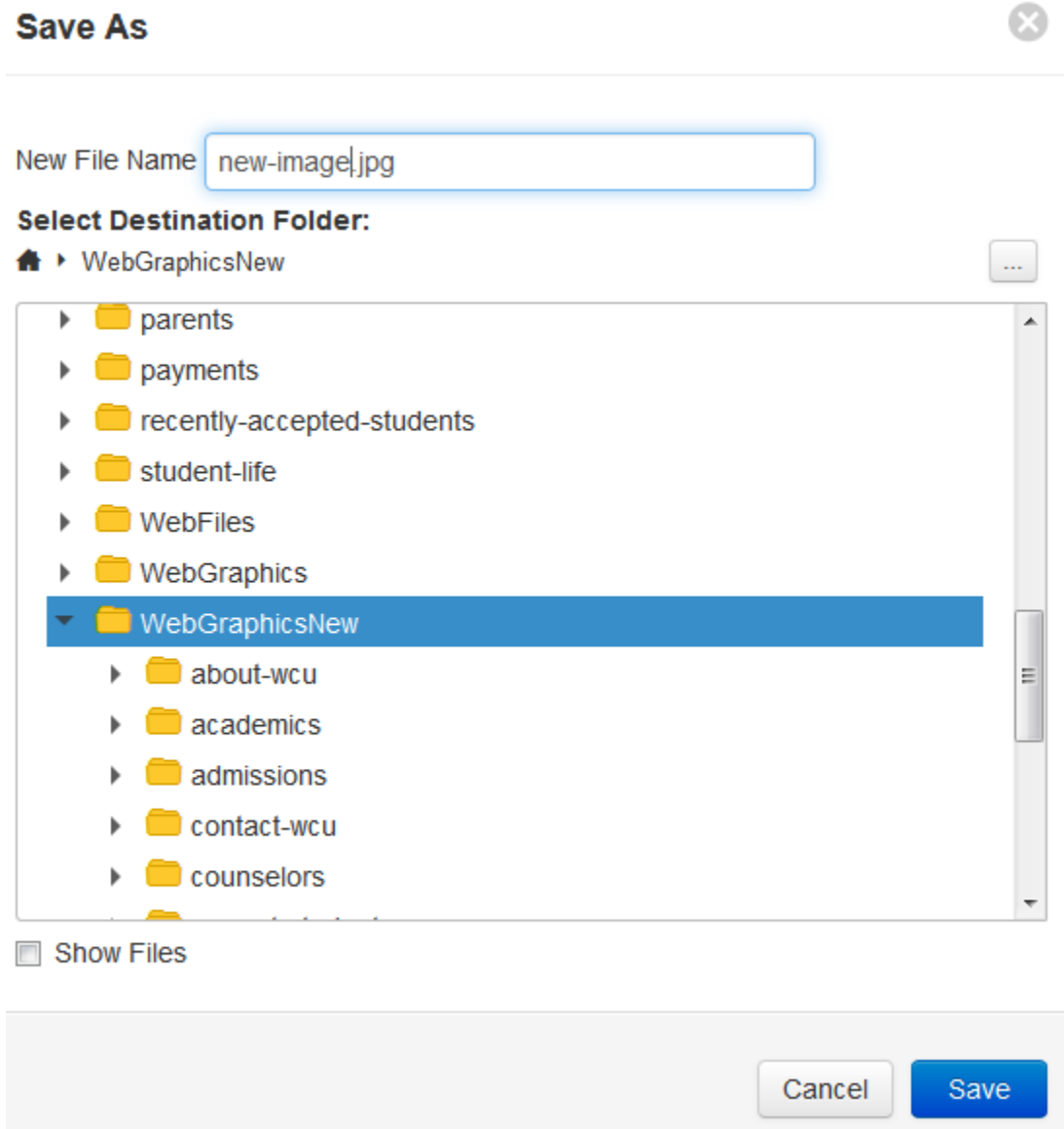
Tools	
 Resize	▼
 Crop	▼
 Rotate	
 zoom	▼
 Undo	
 Redo	

Edit Image



Cancel **Upload**

4. Click on the **Upload** button to upload to the production server.
5. Name the edited image. It is possible to overwrite the existing file with the newly edited file. Remember, overwriting the file affects all pages on which the image has been placed.



6. Click **Save**.
7. The image can now be selected and inserted as a modified image.

To edit an image that has been inserted on a page, simply click on the image, and then click on the **Insert/Edit Image** icon. Follow the steps outlined above to edit, modify the appearance of, or replace the image.

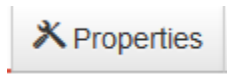
Editing Page Properties

It is important to alter elements within the Page Properties. The available properties depend on the template being used and the requirements for the page to render as desired.

Page Properties change the configuration of the page, toggle on and off include files, or control metadata, among other functionality.

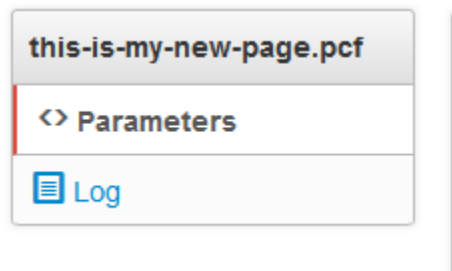
To Access the Page Properties

1. Click the **Properties** button.



2. Alter or add the necessary details and save the changes.

Note: If you are not automatically sent to the <> Parameters subtab, you can click it on the left



Standard Template Pages:

Page Title – The title of the page as it shows up in your browser and bookmarks

Description, Keywords and Author –leave blank.

Page Heading – the headline of the page

Page SubHeading – the subheading of the page

HTTPS – Usually leave unchecked. This tells the page to display as secure – for certain forms and payment

Configure Page Banner – single/no image allows you to add an image yourself. Multiple Images requires administrators to configure the banners and keywords to make banners rotate on your page when the page reloads.

Page Layout – Display one, two or three columns

2011 Modules Show/Hide , 2011 News Module, 2011 Events Module – Ignore for Standard pages

Overwrite Defaults – Must be clicked if you're adding an analytics code.

Additional Analytics – Add a Google Analytics code for your office/department. This code is created by Web Services and provided to you. Your index/homepage should already have this code. If you'd like to receive traffic information on additional pages, this is the spot in which you'd put the code on each page.

Contact Module – Ignore for Standard pages

2011 Template Pages:

Page Title – The title of the page as it shows up in your browser and bookmarks

Description, Keywords and Author –leave blank.

HTTPS – Usually leave unchecked. This tells the page to display as secure – for certain forms and payment

Configure Page Banner – single/no image allows you to add an image yourself. Multiple Images requires administrators to configure the banners and keywords to make banners rotate on your page when the page reloads.

Page Layout – Display one, two or three columns

2011 Modules Show/Hide – Which of these modules will you be displaying?

***** Adding the details for the News and Events modules must be done by Administrators in the Web Services office. You will not want to click to display these modules if they are not already configured by us.**

2011 News Module, 2011 Events Module, Related Info/Links Module – To change the heading of these modules, enter the new heading here

Overwrite Defaults - Must be clicked if you're adding an analytics code or a contact module.

Additional Analytics – Add a Google Analytics code for your office/department. This code is created by Web Services and provided to you. Your index/homepage should already have this code. If you'd like to receive traffic information on additional pages, this is the spot in which you'd put the code on each page.

Contact Module – If you've selected – Left Contact Us module above- you can select an existing contact module to add to your page.

Contact Modules and 2011 Template Pages

If the contact module does not already exist, contact Web Services through the IT Help Desk and request a new contact module.

Edits to contact modules must be made by Web Services.

If the contact module already exists and is in use on another page, you can attach the same module to another page:

1. Open the Page Properties for the page by clicking the **Properties** button.
2. Under the Layout-Configuration section, click the box next to **Left Contact Us**.

Layout - Configuration

Page Layout

Select a layout for the page.

- 2011 Modules Show/Hide
- Left Related
 - Left Events Feed
 - Left Contact Us
 - Left News Feed
 - Right Events Feed
 - Right Related

Left modules require minimum two columns, Right modules require three columns.

3. Scroll down to the **Contact Module** box, under the Module Settings and Default Overwrites heading.

Module Settings and Default Overwrites

Overwrite Defaults Yes

Check this box to activate options in this section

Additional Analytics

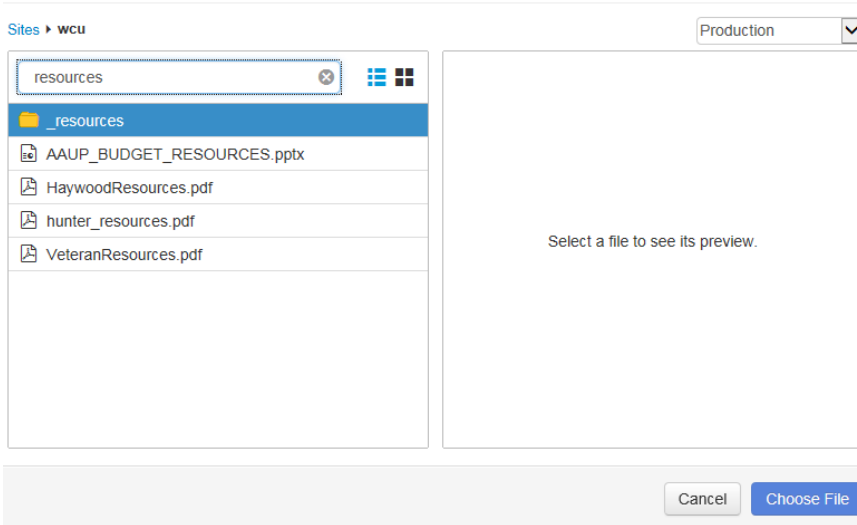
Enter the UA id for an additional google analytics code. This must start with 'UA-'

Contact Module

Specify a file for the contact box

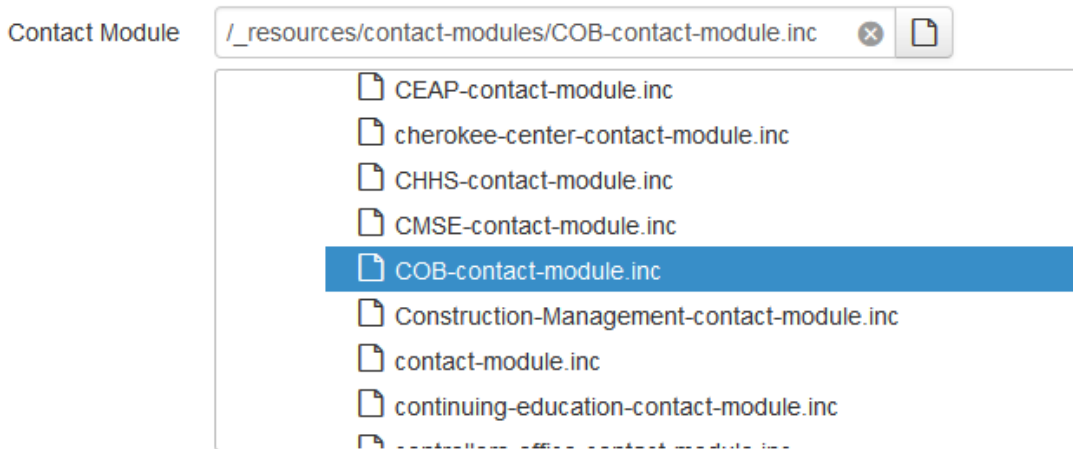
4. Click on the blank page icon.
5. Use the Search Field to enter Resources and find the **_resources folder**. Double-click it to open.

Choose a File



6.

Double Click the Contact Module folder.



Specify a file for the contact box

7. Scroll through the list to select the module you want to include. Click on the file name to select it, then Choose file. Remember to click the “Save” button at the bottom of the page
8. The **Contact Module** box will then be completed with your selection.

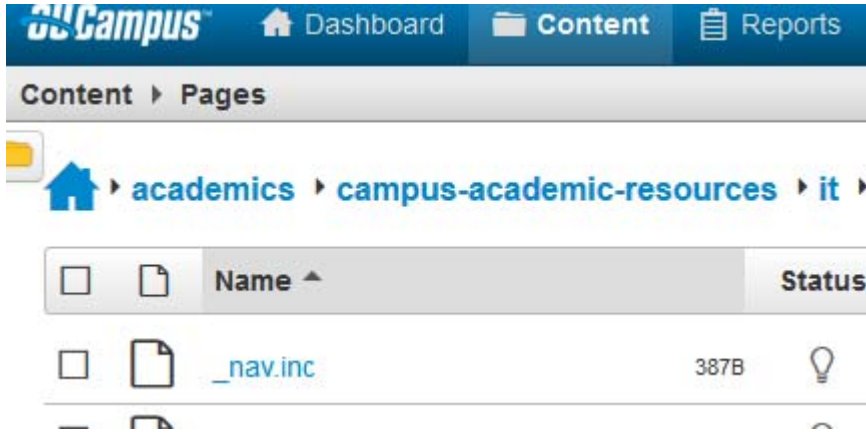
Editing the _nav File (Including hiding pages)

Each folder/section has a _nav file. This file contains the navigation list for its folder.

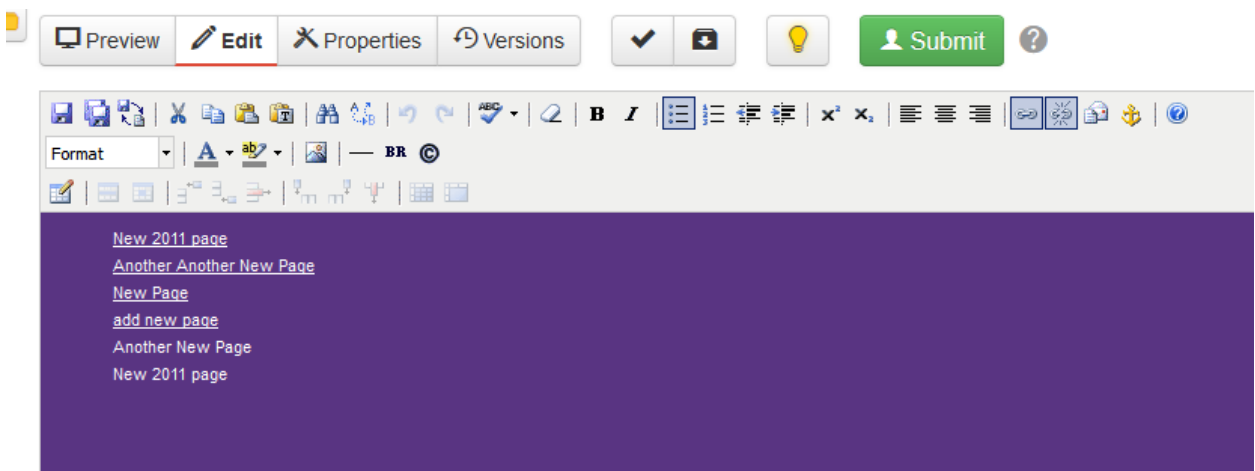
Editing this file allows you to change the order of the list of pages, and allows you to hide a page from the navigation.

Changing the Page Order

1. Go to the **Pages View**. Select the **_nav.inc** file.



2. You can now edit the list



3. Use Copy and Paste to adjust the order of the list.

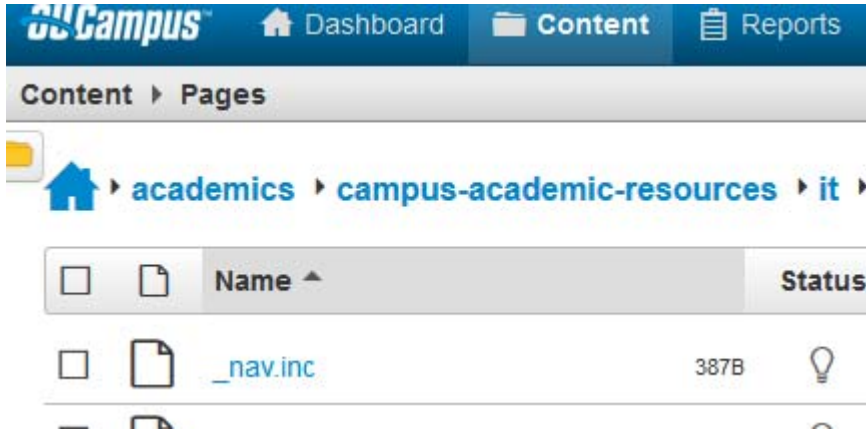
4. Click the **Save Icon** to save.

Note: *To preview your navigation, go to the index page of the section and preview.

5. Send the `_nav.inc` file for approval and publishing.

Hiding a Page

1. Go to the **Pages View**. Select the `_nav.inc` file.

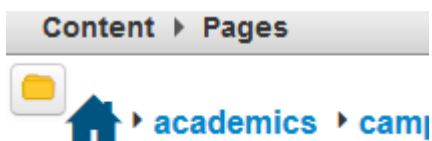


2. Highlight the page you don't want to display in the navigation. Click the delete key on your keyboard.
3. Click the **Save Icon** to save.
4. Send the `_nav.inc` file for approval and publishing.

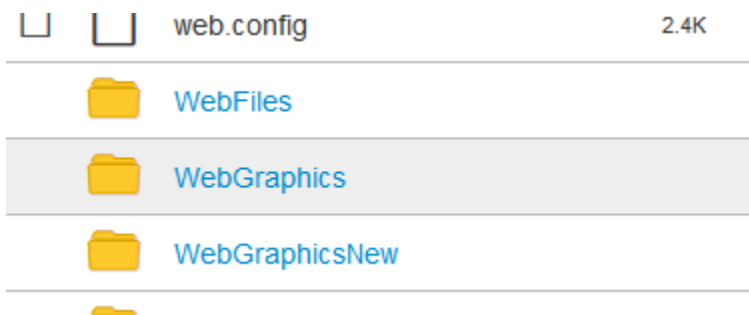
Deleting Files

If you no longer need a Word document, PDF, Excel file, or Image that you've used on your webpages, you can delete them. If the file is still in use on a page, you **WILL** be prompted. Be sure you want to delete this file!

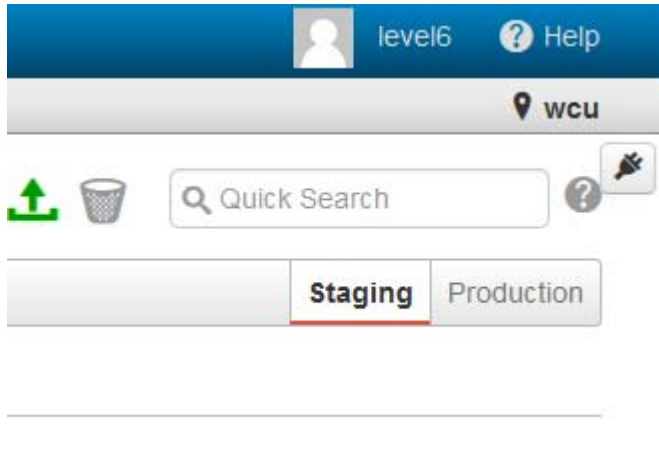
1. Log in to any page and click **Pages** at the top of the screen.
2. Click the house icon to go to the top of the WCU site.



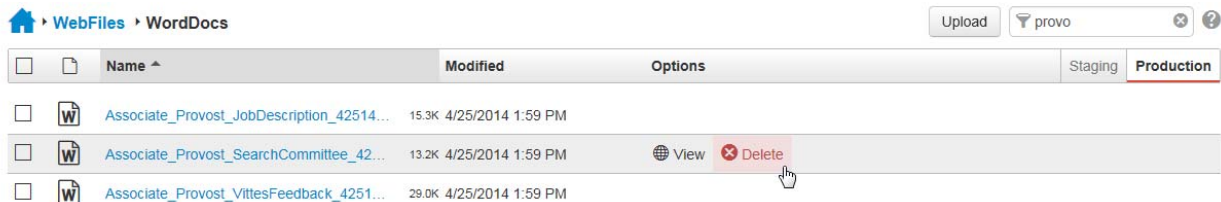
3. Scroll down to **WebFiles, WebGraphics, or WebGraphicsNew**. Files are in WebFiles, Images are in WebGraphics and WebGraphicsNew. Select the appropriate folder.



4. Once you're in that folder, click the **Production tab** at the top right of the screen.



Navigate to the file or image you want OR use the Filter Field located in the top right and begin entering your file name. (No spaces when searching) Once you locate the file, hover over the row and locate the Delete option.



5. You'll be asked if you want to permanently delete the file. Type **delete** in the box and click the **Delete** button. It tells you if a file is in use on a page.

Permanently Delete - 11-10-2011-minutes.docx

You are about to permanently delete ? You will not be able to recover this file from the Recycle Bin. **This operation cannot be undone.**

Type "delete" to confirm

In addition, links to these files will be broken in the following files.

Site "wcu"

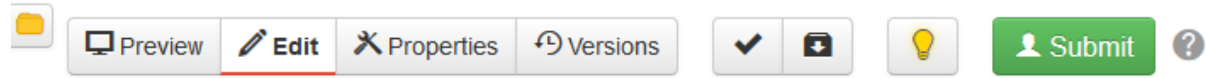
</faculty-staff/staff-senate/staff-senate-minutes.pcf>

Cancel

Delete

NOTE: ***This ONLY works for files in the WebFiles folder, and its subfolders (PDFs, Word Docs, Excel). If your file is NOT in the WebFiles folder, contact Web Services to delete it.

Page Actions



Submit is the button to click to send your edited page to Web Services to be published.

Other page actions include:

- **Preview:** Renders the page as it will appear on the live website.
- **Edit:** Allows you to select a region to edit and use the WYSIWYG Editor.
- **Properties:** Opens the Page Parameters . This now includes Reminders – used for emailing reminders about updating a page at a specific time or when content has not been updated during a set time period and Log – where you can see the past actions submitted.
-

This now also includes **Check** - Used for the page spelling and links checking functionality. And **Save Version (formerly Backup)**- Commits a version of the page to the revisioning system.

- **Versions:** This includes **Compare** - Allows a reviewer to identify changes that have been made by comparing the edited page with a previous or live version. And **Revert** - Enables any previously published or backed-up version of a page to be restored.

Page Check Option

Page Check allows users to check a page's spelling and links prior to sending for approval.



1. Click the **Check** icon in the page actions at the top of the page.
2. Click Run All to run both Spelling and Link checks.
3. Or, click a single check button (Spelling or Links) .
4. Analyze the results.

Page Check - example114.pcf

Scan your page for spelling, link, W3C validation, and accessibility issues. Run all checks, or run individually by clicking the button.

Spell Check Language

English

Spelling Links

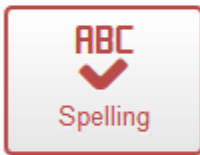
After the check is completed, the results are shown under each option.

Page Check - example114.pcf

Scan your page for spelling, link, W3C validation, and accessibility issues. Run all checks, or run individually by clicking the button.

Spell Check Language

English



Show Results
48 errors



Show Results
Error (1)

Close

If there are errors or warnings, click Show Results.

Before sending to another user for approval and publishing the page, it is advised to fix the identified errors.

Using Spell Check

Spell Check utilizes the OU Campus global dictionary, as well as a custom site-wide dictionary, to spell check a page. You have access to add words to the custom dictionary. Any words in the custom dictionary are ignored by the spell checker.

When errors are encountered, the error report displays the misspelled words and within parentheses the number of occurrences of that word. If the word is not misspelled, it may simply need to be added to the custom dictionary.

Return to the page to edit any misspelled words.

Spell Check Results

<input type="checkbox"/>	Word	Instances	Options
<input type="checkbox"/>	sodales	1	
<input type="checkbox"/>	enim	1	
<input type="checkbox"/>	tincidunt	1	
<input type="checkbox"/>	Vivamus	1	
<input checked="" type="checkbox"/>	lobortis	2	

Link Check Results

Link Check checks the links for both internal and external links and identifies any broken links, as well as any warnings.

Return to the page and correct the broken links.

Link Check Results

Link URL	Staging	Production	Status Code
/_resources/css/styles.css	✓	⚠	200
/#	⚠	❗	200
/#	⚠	❗	200
/	⚠	❗	200
/_training/	⚠	❗	200
/_training/cnn.org	⚠	❗	404
/_resources/css/ouforms-bootstrap.css	✓	⚠	200

Close

Versions - Backup

It is possible to create a backup of pages prior to sending them for review. This backup adds the current configuration of the page, including all the content, to the versioning system. It is possible to revert back to a previous version of a page, both those that have been committed

and those that have been published. It is valuable for users to create a backup of a page prior to sending it for review in case the person to whom it is sent inadvertently reverts it back to the previously published version.

To Create a Backup

1. Do one of the following to click the **Save Versions** button.



2. Enter in a version description.
3. Click **Save Version**

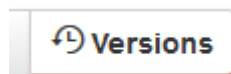
Versions - Revert

At times it may be necessary to revert back to a previous version of a page. For example, there could be a homecoming page with information about what homecoming costs, when it is held, and where it is located. After homecoming is over, the page may be updated to include information about the homecoming game and include pictures of the festivities. When homecoming approaches the following year, the page can be reverted back to the previous year's homecoming information page. It can then be updated with the new information and published.

Keep in mind that when a page is reverted, it is reverted only on the staging server. The page must be published in order for the changes to appear on the production server.

To Revert to a Previous Version of the Page:

1. Do one of the following to click the **Versions** button.



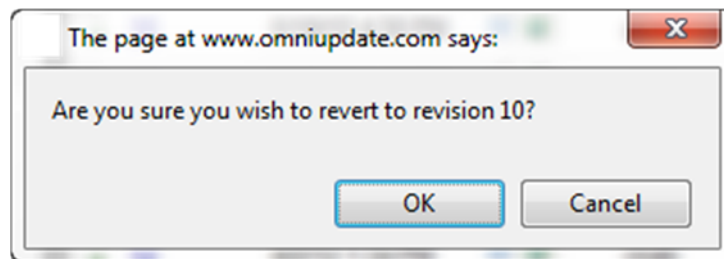
2. Review the versions by using the preview options.
3. Select the desired version by clicking on the revision number.

Preview Edit Properties **Versions** [Checkmark] [Save] [Lightbulb] Submit [Help]

Versions (10) [Filter] [Compare to Live]

Version	Date	User	Description	Options
10	3/31/2014 11:34 AM	wcu	pre binary management	
9(Live)	1/2/2014 2:36 PM	myoung		Live on publish target: wcu
8	3/30/2013 7:58 PM	Omni Admin	Dependency Manager Scanner	
7	3/30/2013 1:15 AM	Omni Admin		
6	3/21/2013 1:14 PM	ckatz		
5	3/20/2013 10:14 PM	ckatz		
4	3/18/2013 2:08 PM	Omni Admin		
3	3/13/2013 1:18 PM	lbranson		
2	3/12/2013 10:29 AM	ckatz		
1	3/11/2013 10:09 PM	ckatz		

4. Click **OK** when prompted.



Moving and Renaming Pages or Files

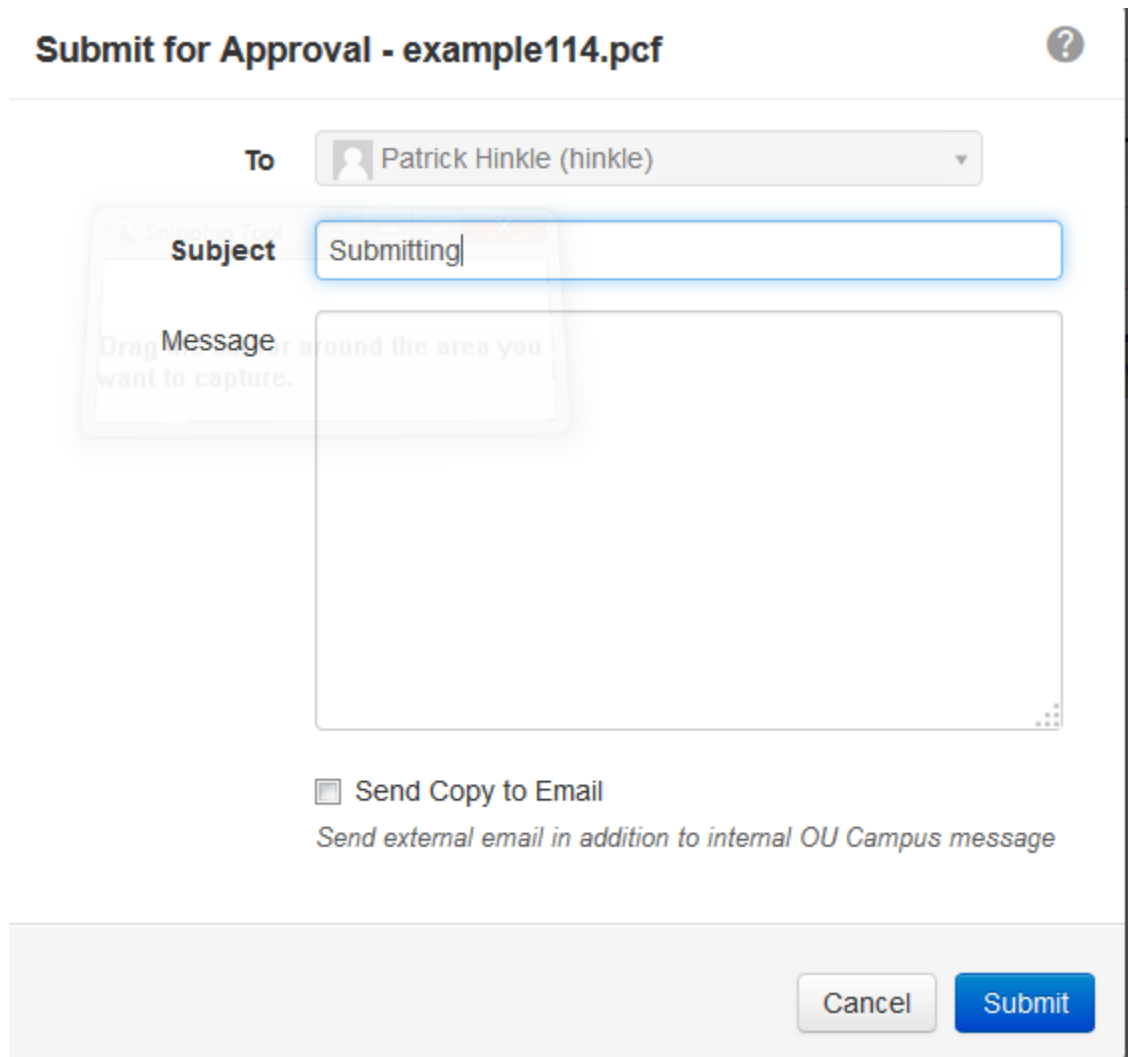
This is an administrative function. If you need something renamed or moved, please contact the IT Help Desk and request our assistance. We'll need to know the file/page name, its current location, and your desired location or rename.

Submitting Pages for Publication



Submit (formerly Send for Approval) You **must** submit the page for approval in order for it to be published to the website.

1. Click the **Submit** button. This displays a mail window.

A screenshot of a web-based email composition window titled "Submit for Approval - example114.pcf". The window has a light gray header with a question mark icon on the right. Below the header, there is a "To" field with a dropdown menu showing "Patrick Hinkle (hinkle)". A "Subject" field is highlighted with a blue border and contains the text "Submitting". Below the subject field is a large, empty "Message" text area. At the bottom of the form, there is a checkbox labeled "Send Copy to Email" which is currently unchecked. Below the checkbox is the text "Send external email in addition to internal OU Campus message". At the very bottom of the window, there are two buttons: "Cancel" and "Submit".

2. Enter a **Subject**. Entering a subject is required.
3. You do NOT need to and should never enter a **Message** for the email. Continue to use the IT Help Desk ticketing system to alert us to issues with a page.
4. Please unselect the checkbox for **Send Copy to Email** so that emails are not sent to our WCU email.
5. Click **Submit**. The Success message informs you that the message was sent.

New Page and Folder/Section Creation

New pages and folders/sections can be created by simply clicking **New** from within the folder structure in the Pages view.

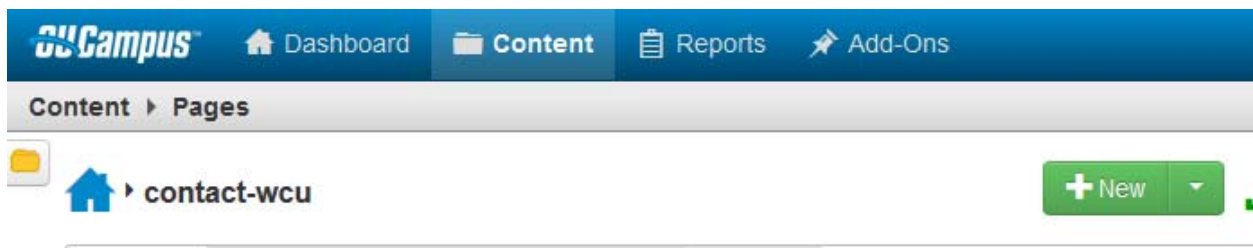
When creating a new section, the supporting files and section's home page are also created.

A **new page** is a single page in an existing section or folder.

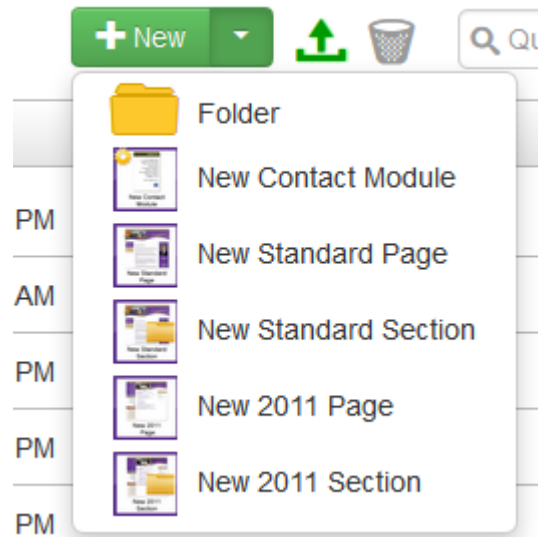
A **new folder or section** is a whole new branch of your website's family tree. Are you adding several pages that are a sub-section of your existing site? If so, that's a section.

To Create a New Page or New Section

1. Go to the page on the WCU website where the page or section will be a child (a page within the current section).
2. Login to OU Campus.
3. Click on Content/**Pages**.
4. Click the **New** button from within the folder structure



5. Select the type to be created. To create a new folder, **New Section** should be used. The section template will contain all of the necessary files to make the pages within the new folder/section render correctly.
6. If your existing section is using the Standard template, select New Standard Page or New Standard Section. If your existing section is using the 2011 Template, select New 2011 Page or New 2011 Section. You cannot change templates after you have made this selection.



7. The page properties must be completed in order for the page or section to be configured.

Page:

Page Layout – one, two or three columns of content on the page.

Page Title – the Headline of the page

Description, Keywords and Author – leave blank.

Add Navigation Item – should this page show up in the navigation section (purple box) on its parent page. The answer is usually Yes. (If you want the page hidden at creation – then choose no.)

Standard Page Filename – a filename for this page. Use only letters, numbers, and hyphens. No spaces or underscores.

Note: Be sure to leave the .pcf extension. If another extension is entered, the header, footer, and other styling will not render.

Standard Page Access – who should have access to **edit this page**? Choose the group from the dropdown. (Access does not mean who can see your page. IF you have changed this to be everyone then any OU User can edit your page. To change it after creation, Web Services will need to do this. Please submit a ticket to the Help Desk.)

Section:

Directory Name – use only letters, number, and hyphens, no spaces or underscores

Friendly Name – The Headline for this section

Page Layout – one, two or three columns of content on the page.

Add Navigation Item – should this page show up in the navigation section (purple box) on its parent page. The answer is usually Yes. (If you want the page hidden at creation – then choose no.)

Standard Page Access – who should have access to edit this page? Choose the group from the dropdown.

8. Click **Create** - The new page or section will be available to be edited.
9. **Submit** the new page(s), the nav.inc file, and the props.pcf file for approval.

Setting Reminders

Reminders can be set on any page to which the user has been granted access by an administrator, even if the page is currently checked out to another user. Multiple individuals can set a reminder on the same page, and both types of reminder options can be set for one individual.

There are two reminder options:

- **Schedule Reminder** — Used to define a particular date and time on which the reminder message should be sent. Can be set as repeating.
- **Stale Reminder** — Used to schedule a reminder to be sent if the page is not updated within a defined period of time.

Schedule Reminder

A Schedule Reminder is used when there is a specific time period or date when the reminder message must be sent. An example of when a Schedule Reminder is appropriate is on a tuition page. If the tuition is updated on a yearly schedule, a reminder may be set for a week prior to the tuition change and set to repeat on a yearly basis.

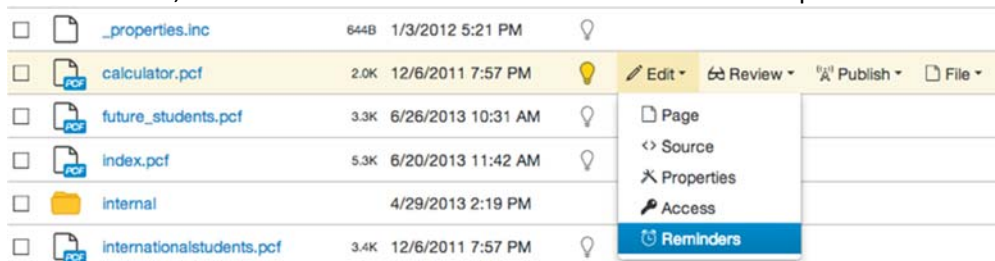
Stale Reminder

A Stale Reminder is used to make sure that content is being updated in one way or another within a defined period of time. It is important that users understand how the “clock is reset” with Stale Reminders. When a page is backed up or published, regardless of the type of publish (page publish, directory publish, site publish, asset update publish, Dependency Manager publish, or revert) the Last Published date and time reset and the timer on the Stale Reminder starts over.

Scheduling a Reminder

Required items are shown onscreen in bold. Users select a date and time, and can select an interval by which to repeat the reminder. The following example makes use of a PCF, but a reminder for a binary file can also be set in a similar fashion.

1. Navigate to the **Pages** list view.
2. In the file row, hover over **Edit** and choose **Reminder** from the drop-down menu.





This shows the **Reminders** dialog where both a scheduled or stale reminder can be set.

Reminders - /examples/actions/reminder-example.pcf

Scheduled Reminder | **Stale Reminder**

Set Scheduled Reminder

Date 

Time 

Repeat every Days

Notification

To

Subject

Message


Send Copy to Email
Send external email in addition to internal OU Campus message


3. Select the checkbox next to **Set Scheduled Reminder**.

Scheduled Reminder

Set Scheduled Reminder

4. Select the **Date** for the reminder to begin. Click inside the date field or on the calendar icon for a date picker from which the date may be selected. The date may also be entered manually.

Date 

Time 

5. Select the Hour and Minute, and AM or PM as necessary by clicking inside the time field or entering manually.

Time 12:00 AM

every

12 : 00 AM

To

6. If the reminder should recur, enter the numeric interval and select the period of time for **Repeat Every**. Period options include: **Days, Weeks, Months, Years**.

Repeat every 10 Days

Days

Weeks

Months

Years

Notification To (Myself)

Subject Email reminder

7. An internal and external notification is sent by default, and optionally, the details can be changed in the **Notification** section. Select the group to whom the notification should be sent or select **Myself**. The default settings are used, if no changes are made.
8. Enter in the **Subject** and **Message** to be sent.

Subject Reminder for Tuition Page!

Message Reminder to update the tuition page for 2015.

9. Clear the **Send Copy to Email** checkbox. (I wonder if we want to clear this or leave it checked?)
10. Click **Save**.

Example Scheduled Reminder

Reminders - /examples/actions/reminder-example.pcf

Scheduled Reminder

Stale Reminder

Set Scheduled Reminder

Date

Time

Repeat every

Notification

To

Subject

Message

Send Copy to Email
Send external email in addition to internal OU Campus message

Stale Reminder

A stale reminder is triggered when a page has not been updated for a set amount of time. The notification reminder is sent in the form of an email. Simply select the time period and fill out an optional external notification email to be reminded when a page becomes stale. Only pages that have been published can have stale reminders set.

1. Navigate to the **Pages** list view.
2. Hover over **Edit** on the page row, and choose **Reminder** from the drop-down menu.

<input type="checkbox"/>	_properties.inc	644B	1/3/2012 5:21 PM		
<input type="checkbox"/>	calculator.pcf	2.0K	12/6/2011 7:57 PM		<div style="display: flex; gap: 5px;"> Edit Review Publish File </div>
<input type="checkbox"/>	future_students.pcf	3.3K	6/26/2013 10:31 AM		<div style="display: flex; gap: 5px;"> Page Source Properties Access Reminders </div>
<input type="checkbox"/>	index.pcf	5.3K	6/20/2013 11:42 AM		
<input type="checkbox"/>	internal		4/29/2013 2:19 PM		
<input type="checkbox"/>	internationalstudents.pcf	3.4K	12/6/2011 7:57 PM		

This shows the **Reminders** dialog where both a scheduled or stale reminder can be set.

3. Click the **Stale Reminder** tab.
4. Select the **Set Stale Reminder** checkbox.
5. The **Last Published** date and time is displayed.
6. In **Stale After** field enter the number and select the period of time to define the stale interval. Period options include: **Days, Weeks, Months, Years**.
7. An internal and external notification is sent by default, and optionally, the details can be changed in the **Notification** section. Select the group to whom the notification should be sent or select **Myself**. The default settings are used, if no changes are made.
8. Enter in the **Subject** and **Message** to be sent.

Subject

Message

9. Clear the **Send Copy to Email** checkbox.
10. Click **Save**.

Example of Stale Reminder

Reminders - /examples/actions/reminder-example.pcf

Scheduled Reminder Stale Reminder

Set Stale Reminder

Last Published 4/28/2014 10:30 AM

Stale After

Notification

To

Subject

Message

Send Copy to Email
Send external email in addition to internal OU Campus message

NOTE: The stale page reminder checks from the last published date and time, not the date and time that the stale reminder was set.

Editing a Reminder

To deactivate a reminder:

1. Navigate to the **Pages** list view.
2. Hover over the row, and from the **Edit** menu, select **Reminders**.
3. Clear the checkbox for **Set Scheduled Reminder** or **Set Stale Reminder** as necessary.
4. Click **Save Changes**.

The details of reminder may also be edited in this manner.

Schedule Reminder

Date: << Feb 2012 >>

S	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29			

Choose a date

Hour: 7 AM

Minute: :30

Repeat every: 6 Months

Subject: Update Tuition Page

Contents: Update the tuition page with the new tuition rates.

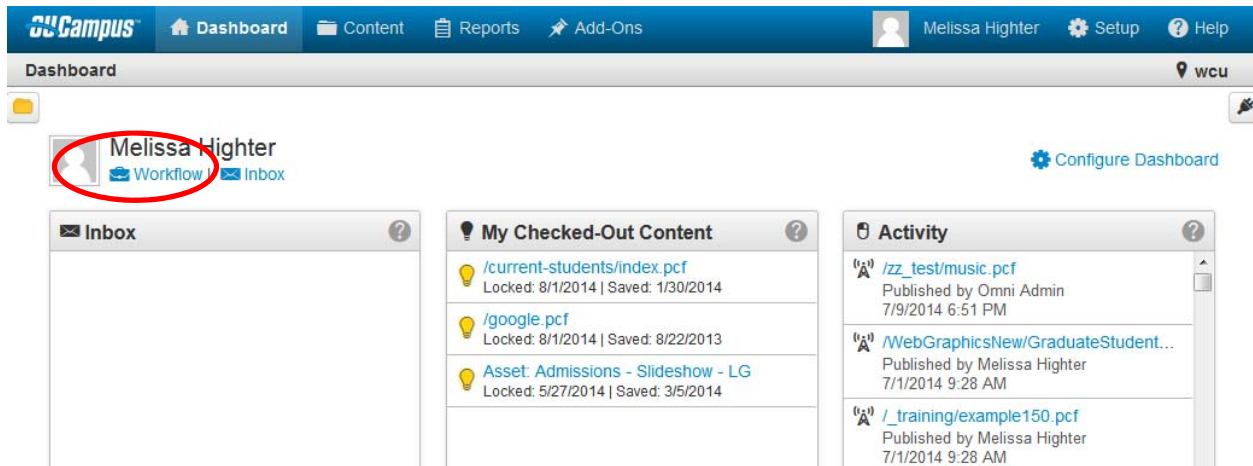
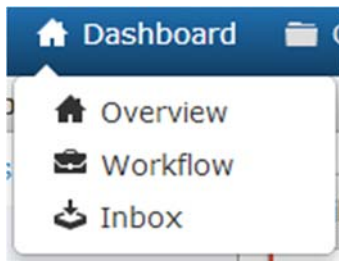
Send to email? *Checking the box sends the message to both your OU Inbox and your external mail account.*

Stale Reminder

Dashboard

Workflow

Workflow can be found from the dashboard, either by clicking the Workflow link on the Dashboard screen, or by clicking Workflow in the drop-down Dashboard menu.



Workflow Screen

The Workflow screen includes the following features and functionality:

- Shows the number of items in the Workflow
- Includes the ability to filter based on the user who sent the content or the approver
- Can use multi-select in order to delete multiple workflow messages with the same action
- Can use the selection checkboxes to select a message to view or delete
- The list can be sorted by From, Approver, File, Status, or Date
- Click the linked file name to view the Preview of the content
- Shows the status
- Shows the date and time that the content was sent for approval

Mailbox	Workflow (5) <input type="text" value="Filter"/>					
Workflow	<input type="checkbox"/>	From	Approver	File	Status	Date / Options ▾
Inbox	<input type="checkbox"/>	interim-approver	Henry Jones	/examples/workflow/index.pcf		2/13/2014 11:46 AM
Sent	<input type="checkbox"/>	Franny Aansen	Henry Jones	/examples/workflow/workflow...		2/5/2014 1:41 PM
	<input type="checkbox"/>	Henry Jones	interim-approver	/examples/workflow/workflow...		2/5/2014 1:02 PM
	<input type="checkbox"/>	interim-approver	Henry Jones	/examples/workflow/workflow...		2/5/2014 12:39 PM
	<input type="checkbox"/>	interim-approver	Henry Jones	/examples/workflow/workflow...		2/5/2014 12:28 PM

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 page or file actions on the content, including decline and revert. For example if the content is an image, the Image Editor is automatically previewed. If the content is a page, the preview of the page is shown.

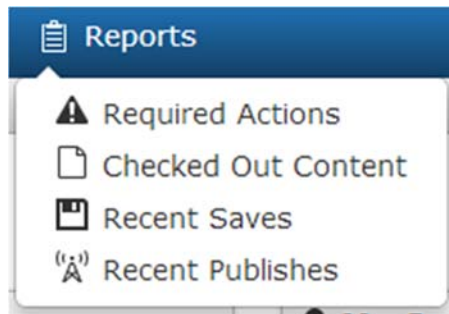


Status

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 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

Reports



Required Actions

Required Actions is a report for the **WHOLE SITE** that pertains to the Administrators of the site. There are two list views: Broken Pages and Out of Sync Pages, which display any broken dependencies for the site on which the administrator is working and pages out of sync across all sites in order to allow an administrator to publish them.

Checked Out Content

The Checked Out Content report shows **YOUR** pages, files, and assets that are currently checked out. From the displayed list of files, it is possible to preview any page by clicking the preview button, or check-in any page by clicking the glowing light bulb next to the appropriate page.

Recent Saves

The Recent Saves report displays a list of content that has been recently saved **FOR THE WHOLE SITE**, and includes information about the type of save that was performed. The content listing includes linked file names to preview the content. The report is paginated so that a user might navigate through the list of pages in manageable chunks and may export the report to CSV.

Recent Publishes

The Recent Publishes report displays a list of content that has been recently published **FOR THE WHOLE SITE**, and includes information about the type of publish that was performed. The content listing includes linked file names to preview the content. The report is paginated so that a user might navigate through the list of pages in manageable chunks and may export the report to CSV.