Administrator Training

OmniUpdate User Training Conference 2016 Activity Guide

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Contents

Administrator Training

Reports Menu

Preparing Files for Admin Activities

Purpose: To prepare files for admin related activities.

Objective: Check out pages, send pages for review, and schedule actions on pages.

1. Log in as the Level 6 user.
2. Navigate to the **Pages** list view by selecting **Content > Pages**.
3. Check out a page by selecting the **Lightbulb** icon on a page's row and leave the file checked out.
4. Navigate to another page and check it out.
5. Edit another page and choose to **Send for Approval**.
6. Set a **Scheduled Reminder** on a page by hovering over the page's row and selecting **Reminders** from the **Edit** menu.
7. Log out and log back in as the Level 8 user.
8. Navigate to another page and **Schedule** it to publish in the future by hovering over the page's row and selecting **Schedule** from the **Publish** menu.
9. Set a **Stale Reminder** on another page.
10. Log out and log back in as an administrator.
11. **Schedule** a reminder on a page, and select a group of people for the reminder by selecting a **Group** from the **Send To** drop-down menu.

Checking in a Page

Purpose: To understand how content gets checked out, and how Level 9 and Level 10 administrators can check content in.

Objective: Check out a page and check it back in via the **Reports > Checked Out Content** screen.

1. Navigate to the **Checked Out Content** view by selecting **Reports > Checked Out Content**.
2. Notice the available actions.
3. Under the **Status** column, click the **Check-in** icon.

Reassigning a Page

Purpose: To understand what happens in workflow when a page gets sent to a user or sent for approval, and how Level 9 and Level 10 administrators can reassign content.

Objective: To reassign a page sent for approval.

1. Navigate to the **Pending Approvals** view by selecting **Reports > Pending Approvals**.
2. Hover over a page's row to display the available actions.
3. Select **Reassign** from the **Actions** menu.

4. In the **Reassign Approval** modal, select a user to send the file from the **To** drop-down, create a **Subject**, and optionally include a **Message**.
5. Click **Submit**.

Changing a Scheduled Action

Purpose: To understand what happens in workflow when scheduling an action for a page.

Objective: To change and cancel a scheduled action.

1. Navigate to the **Scheduled Actions** view by selecting **Reports > Scheduled Actions**.
2. Note the details for the pages, such as the **Owner** and **Target Time**.
3. In the **Status** column, click the **Calendar** icon.
4. **Remove** the scheduled publish.
5. Select a reminder icon in the **Status** column of the **Scheduled Actions** list view.
6. Update the reminder and change the date.
7. Save and observe the changes in the **Scheduled Actions** view.
8. Click on a different reminder.
9. Uncheck the **Set Scheduled Reminder** box in the **Reminders** modal.
10. Save the changes.
11. Observe that the reminder was canceled.

Running Site Check

Purpose: To understand how to use administrative powers to perform maintenance on a site in OU Campus.

Objective: Run a Site Check test.

1. Navigate to the **Site Check** view by selecting **Reports > Site Check**.
2. In the **Scope** panel, select the checkbox next to each directory or page that is to be included in the site check.
3. In the **Link Check** panel, optionally select **Follow Redirects** or **With Includes** and then set a **Timeout** amount from the drop-down.
4. **Run** the report.

Setup Account

Creating an Add-On

Purpose: To create an Add-On for the site.

Objective: Bookmark the OmniUpdate website.

1. Navigate to the **Account** view by selecting **Setup > Account**.
2. Navigate to the **Add-Ons** panel.
3. Click **Add**.
4. Create a user-friendly **Name** that will be displayed for the add-on.
5. Manually input or copy and paste the URL path of the desired add-on in the **URL** field.
6. Leave the **Admin Only** and **Open in New Window** checkboxes deselected.

7. Click **Save**.
8. Refresh the browser and select on the **Add-Ons** tab in the global navigation bar to verify the new Add-On is being recognized by the system.

Users and Groups

Creating a User

Purpose: To understand how users are created and the various settings that can be assigned.

Objective: To create a new user with a defined password, designated permissions level, approver, and upload capabilities.

1. Navigate to the **Users** view by selecting **Setup > Users**.
2. Click **New**.
3. Give the user a **Username** in the **User Information** panel.
4. Assign a **Password** in the **User Information** panel.
5. Enter the user's **First Name** in the **User Information** panel.
6. Enter the user's **Last Name** in the **User Information** panel.
7. Assign a **User Level** from the drop down in the **Restrictions** panel.
8. Assign an **Approver** from the drop down in the **Restrictions** panel.
9. Make additional selections as desired.
10. Click **Create**.
11. Log out and log in as the new user to test. Then log back in as an administrator.

Creating a Group

Purpose: To understand how a group is created and members are added to it.

Objective: To create a group and add members to it.

1. Navigate to the **Groups** view by selecting **Setup > Groups**.
2. Click **New**.
3. Give the group a **Name**. Keep in mind that this cannot be changed once saved.
4. In the **New Group** modal, add users from the **Available Users** list to the **Members** list using the arrow keys.
5. Click **Save**.

Assigning a Group to a Directory

Purpose: To understand the process of how a group is assigned to a directory.

Objective: To modify a directory's Access Group from one group to another.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over a directory's row to display the available actions.
3. Select **Access** from the **Edit** menu.
4. In the **Access Settings** modal, select a new group from the drop-down labeled **Access Group**.
5. Click **Save**.

Toolbars

Creating a Toolbar

Purpose: To understand how a custom toolbar can be created and used to restrict access to specific editing features.

Objective: Create a custom toolbar with selected features and test the changes.

1. Navigate to the **Toolbars** view by selecting **Setup > Toolbars**.
2. Click **New**.
3. Give the toolbar a **Name**.
4. Deselect the checkbox next to any tool to disable it, and select the checkbox next to any tool to enable it.
5. Select a **Font Size Set** from the drop-down in the **Options** panel if desired.
6. Select the radio button for **All Paste Options** or **Paste as Plain Text Only**.
7. Click **Create**.

Assigning a Toolbar to a Page

Purpose: To understand how a custom toolbar can be assigned to a page or directory to restrict access to specific editing features.

Objective: Assign a custom toolbar to a page and test the changes.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over the page's row to display the available actions and select **Access** from the **Edit** menu.
3. Navigate the **Toolbar** drop-down and select the desired toolbar.
4. Click **Save**.
5. To test, edit the page and notice that the toolbar options correspond to the toolbar defined in the **Restrictions Page Access Settings** panel.

Templates and Template Groups

Assigning a User Group to a Template

Purpose: To understand how assigning a group to a template restricts access to the template.

Objective: Edit the group that has access to the New Section template and test the changes.

1. Navigate to the **Templates** view by selecting **Setup > Templates**.
2. For the **New Section** template, change the user group assigned by selecting a new group from the available to drop-down.
3. Click **Save**.
4. Log out and log in as a user from a group other than the one assigned to the template.
5. Navigate to the **Pages** list view by selecting **Content > Pages** and into a directory with a template group that has the **New Section** template assigned.
6. Click **New**.
7. Notice that the **New Section** template is not available.
8. Log out and log back in as a user in the group that is assigned to the template.
9. Navigate to the same directory.

10. Click **New**.
11. Notice that the **New Section** template is available.

Creating a New Template Group

Purpose: To understand how to configure a template group.

Objective: Create and assign a Template Group.

1. Navigate to the **Template Groups** view by selecting **Setup > Templates**.
2. Select the **Template Groups** menu item in the **Left Navigation** menu.
3. Click **New**.
4. Give the group a **Name** in the field. For example, **News Page Only**.
5. Select which templates should be available in the group, as well as whether or not the **New Folder** option should appear.
6. Click **Save**. The template group is now displayed in the **Template Groups** view.

Assigning a Template Group to a Directory

Purpose: To understand how to assign a template group to a directory and restrict access to what type of content users can create.

Objective: Assign the new template to a directory and observe the restrictions by attempting to create a new page.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over a directory's row to display the available actions.
3. Select **Access** from the **Edit** menu.
4. In the **Access Settings** modal, select the new template group from the **Template Group** drop-down.
5. Click **Save**.
6. To test, navigate to the directory to which the template group was assigned.
7. Click **New**. The only templates that should be available are the ones from the template group.

RSS Feeds

Creating a New RSS Feed

Purpose: To understand how to configure the settings for a news feed.

Objective: Add an RSS feed.

1. Navigate to the **RSS Feeds** view by selecting **Content > RSS**.
2. Configure the feed as follows (substituting the [#] for the actual workshop number):
1. **Path**: /rss/weather.xml
2. **Template**: /generic-mrss-2_0.xml
3. **Title**: Gallena Weather Today
4. **Description**: Weather at Gallena University
5. **Link**: http://workshop[#].outc15.com
6. **Publish Date**: [BLANK]
7. **Publish Time**: [BLANK]

8. **Item Count**: 50
3. Click **Save**.
4. Hover over the feed's row to display the available actions and select **Publish** to rebuild the feed.
5. Navigate to the URL for the feed which is the site URL, plus the feed path.
6. Notice there are not any feed items.

Assigning a New Feed to a Directory

Purpose: To understand how to set RSS access settings for a page, if it is not automatically configured by the TCF.

Objective: Assign a news feed to a page.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Create a **New** news directory.
3. Hover over the directory's row to display the available actions and select **Access** from the **Edit** menu.
4. In the **Access Settings** modal, select the **Apply Selected Settings to This Folder and All Enclosed Files and Folders** option.
5. Check the box in front of the **RSS Feed** drop-down and select the weather feed.
6. Click **Save**.

Creating a New RSS Feed Item

Purpose: To understand how to create a new RSS Item for an RSS feed.

Objective: Create a new feed item for the weather feed.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Create a **New** news page inside the previously created news directory.
3. Add some content.
4. **Publish** the page.
5. Ensure the page is still checked out by clicking the lightbulb icon so it turns yellow.
6. Hover over the target page's row to display the available actions.
7. Select **RSS** from the **Edit** menu.
8. In the **RSS Items** view, click **New** in the top left of the screen.
9. In the **Item Properties** panel, create a **Title** and **Description**.
10. Click **Save**.
11. **Publish** the page.
12. Navigate to the feed in another tab and view the new item has been added.

Snippets

Creating a New Snippet

Purpose: To understand how snippets and snippet categories are used in OU Campus.

Objective: Create a snippet category and then create a snippet to include in the category.

1. Navigate to the **Snippets** view by selecting **Content > Snippets**.
2. In the **Snippet Categories** view, click **New**.

3. Create a user-friendly **Name** in the modal.
4. Click **Create**.
5. From the **Snippet Categories** view, select **Snippets** from the **Left Navigation** menu.
6. Click **New**.
7. In the **Create Snippet** modal, select a **Category** for the snippet from the drop-down menu.
8. Give the snippet a **Name**.
9. Click on the text field labeled **File** to open a file browser.
10. Select the snippet from the file structure.
11. Click **Insert**.
12. Optionally, enter a brief **Description**.
13. Click **Create**.

Find and Replace

Conduct a Find and Replace

Purpose: To understand how Find and Replace works and how it can be utilized for administrative functions.

Objective: Complete a Find and Replace.

1. Navigate to the **Find and Replace** view by selecting **Content > Find and Replace**.
2. **Find** “Gallena University.”
3. Uncheck **Ignore Case**.
4. **Replace With** “GU.”
5. Select the files and folders in which to search from the **Scope** panel.
6. Click **Preview Replace**.
7. Review the results.
8. Select the files to **Replace**.
9. Complete the replacement.
10. Review the changes.
11. Navigate back to the **Last Find and Replace**.
12. Select all files.
13. **Revert** the last change.