



End-User Training

2016 OmniUpdate User Training Conference Activity Guide

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End-User Training

Accessing and Editing Content

Logging in to OU Campus with DirectEdit

Purpose: To understand how to log in to OU Campus to edit content.

Objective: Log in to OU Campus using a DirectEdit link.

1. Navigate to any page within a site in OU campus.
2. Click on the **DirectEdit** link on the published page. For the workshop, this is the “Last Updated” link in the footer.
3. Log in as the Level 6 user.

Accessing JustEdit

Purpose: To understand how to access JustEdit and use it to edit content.

Objective: To open an editable region on a page to display the JustEdit Editor.

1. After logging in via DirectEdit, click on the main content’s editable region button.
2. Make edits to the page including formatting text, adding, and deleting content, inserting links, images, and a YouTube video, as well as adding a snippet and asset.
3. **Save** the changes.
4. **Preview** the results.

Formatting Text

Purpose: To format text using JustEdit.

Objective: To bold and italicize text and add CSS styling.

1. Navigate to any page and select an editable region to open **JustEdit**.
2. Highlight a selection of text.
3. Click the **Bold** icon on the toolbar to turn the selected text bold.
4. Click the **Italics** icon to make the text italic. These are both span-level formatting elements.
5. Place the cursor in the second paragraph. Navigate to the **Styles** drop-down. Scroll down to **Center Text** and click. Notice that the entire paragraph becomes centered. This is an example of a block-level formatting element.

Inserting a Link

Purpose: To create a link within the content on a page.

Objective: Link to another page.

1. Navigate to any page and select an editable region to open **JustEdit**.
2. Highlight a selection of text.
3. Click the **Insert/Edit Link** icon.
4. Click on the **Browse** button next to the field labeled **URL**. To include links from an external source simply copy and paste the URL into the **URL** field.

5. In the **Select File** modal, select a file path from the file structure to link to and click **Insert**.
6. Populate the **Title** field with a user-friendly title.
7. When all of the fields have been populated, click **Insert**.

Uploading an Image from JustEdit

Purpose: To understand how to access JustEdit and use it to upload content.

Objective: To upload a file from within JustEdit.

1. Navigate to any page and select an editable region to open **JustEdit**.
2. Select an area within the editable region where the image will be inserted and click **Insert/Edit Image**.
3. Click the **Browse** button next to the field labeled **Source**.
4. Using the **Select Image** modal, navigate to the location where the image should be stored.
5. In the modal, click the **Upload** button.
6. Click **Add Files** to open the file browser, or drag and drop the files directly into the **Upload** modal from any external source including the user's desktop.
7. Click **Start Upload**.
8. Select the file that was uploaded.
9. Create an Image **Description** and a **Tooltip**.
10. Edit the **Dimensions** of the image,
11. In the **Appearance** tab, define the alignment and add padding.
12. Click **OK**.

Inserting a Video

Purpose: To understand how to insert media.

Objective: Insert a YouTube video directly into a page.

1. Navigate to any page and select an editable region to open **JustEdit**.
2. Select an area within the editable region where the image will be inserted and click **Insert/Edit Video**.
3. Open a new tab in the browser, navigate to <http://www.youtube.com> and browse for a YouTube video. Copy the URL to the clipboard.
4. Navigate back to OU Campus and paste the URL into the **Source** field in the **Insert/Edit Video** modal. Notice that the **Dimensions** will change automatically once the address is pasted into the **Source** field.
5. Click **OK**. The video is now inserted into the page.

Inserting a Snippet

Purpose: To add a snippet to a page and customize it.

Objective: Insert a table snippet and modify it.

1. Navigate to any page and select an editable region to open **JustEdit**.
2. Select an area within the editable region where the image will be inserted and click **Insert Snippet**.

3. In the **Choose Snippet** modal, select a **Snippet**. Snippets can be filtered by category and by text string.
4. Once the snippet is selected, a preview is shown. To confirm the choice, click **Insert**.
5. Modify the snippet using table tools and other JustEdit toolbar icons.

Inserting an Asset

Purpose: To add assets onto a page, save the changes and then publish the page with the asset.

Objective: Insert two assets.

1. Navigate to any page and select an editable region to open **JustEdit**.
2. Select an area within the editable region where the image will be inserted and click **Insert Asset**.
3. In the **Select Asset** modal, select the asset from the list. A preview is displayed to the right of the list when an asset is selected. Optionally, filter the list with the Filter tool to restrict the results displayed in the list.
4. Click **Insert**. The asset will not render in preview mode but is inserted into the page.
5. Repeat steps 1-4 but insert a different type of asset.

Editing Page Properties

Purpose: To understand how Page Properties are used when creating and editing content.

Objective: To access the Properties view and change several page properties.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Check out a page by clicking the page's lightbulb icon so that it turns yellow.
3. Hover over the page's row to display the available actions and select **Properties** from the **Edit** menu.
4. Make edits to the available properties.
5. Click **Save**.
6. Observe the changes on **Preview**.

Reviewing Content

Comparing Page Versions

Purpose: To understand how Compare functions in OU campus

Objective: To compare the current configuration of the live version of a page to a previous version on the staging server and observe the differences.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Check out a page by clicking the page's lightbulb icon so that it turns yellow.
3. Hover over the page's row to display the available actions and select **Versions** from the **Review** menu.
4. In the **Versions** view, click the **Compare to Live** button.
5. Toggle between the different views of **Version Compare** using the **Page** and **Source** buttons in the top right hand corner of the browser and observe the differences.

6. Toggle the **Show/Hide Includes** button to preview the bare page without additional include files, such as the side navigation.

Using Page Check

Purpose: To understand how to use the Page Check tool.

Objective: To initiate a Page Check on a page and utilize the tools available to proof and edit the content for accessibility and compatibility.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Check out a page by clicking the page's lightbulb icon so that it turns yellow.
3. Hover over the page's row to display the available actions and select **Page Check** from the **Review** menu.
4. Select a file extension type from the drop-down (html for full web version, htm for mobile).
5. Set the **Spell Check Language** to **English**.
6. From the **Page Check** modal, click on **Spelling, Links, W3C Valid, or Accessibility** to initiate one of the scans.
7. View the results for each test.

Publishing Content

Creating a Backup

Purpose: To understand how to protect a page without publishing it.

Objective: To save a backup version of a page to the staging server and observe the results from the Versions view.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Check out a page by clicking the page's lightbulb icon so that it turns yellow.
3. Hover over a page's row to display the available actions and select **Save Version** from the **Review** menu.
4. In the **Save Version** modal, enter a **Version Description** that helps identify the version to other users and separates its classification from other versions.
5. Click **Save Version**.
6. Hover over the same page's row and select **Versions** from the **Review** menu. Note that the version will appear in the **Versions** view.

Sending for Approval

Purpose: To understand the approval workflow.

Objective: Send a page for review to another user.

1. Navigate to the **Pages** list view by selecting **Content** or **Content > Pages** from the global navigation bar.
2. Check out a page by clicking the page's lightbulb icon so that it turns yellow.
3. Hover over a page's row to display the available actions and select **Submit for Approval** from the **Publish** menu.
4. Select a user to send the file to from the **To** drop-down menu.

5. Create a **Subject** and **Message** to help the receiving user identify the file and what content needs approving.
6. Click **Submit**.

Scheduling a Scheduled Reminder

Purpose: To understand how to schedule a reminder.

Objective: Set a scheduled reminder.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over a page's row to display the available actions and select **Reminders** from the **Edit** menu.
3. In the **Reminders** modal, select the checkbox for the **Schedule Reminder** tab to enable the reminder.
4. Select a **Date** and **Time** for the reminder.
5. Select a target user to receive the reminder from the **To** drop-down menu.
6. Then include a **Subject** and **Message** that details the reminder information.
7. Click **Save**.

Publish Now

Purpose: To understand the process for publishing a page and the associated actions.

Objective: To publish a page to the production server while completing the publish actions.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over a page's row to display the available actions and select **Publish** from the **Publish** menu.
3. Run any of the available tests including **Spelling**, **Links**, **WC3 Valid**, and **Accessibility**.
4. Select a **Publish Target** to publish the file to.
5. Include a **Version Description** to help other users identify the file.
6. Click on **Social Media** and configure a tweet and wall post.
7. Click **Publish Now**. The file is then uploaded to the target production server.

Scheduling a Publish

Purpose: To understand how to schedule a page publish.

Objective: Schedule a page to be published at a future date.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over a page's row to display the available actions and select **Schedule** from the **Publish** menu.
3. In the **Schedule** modal, select a **Date** and **Time** for the file to publish.
4. Complete any **Final Check** actions necessary.
5. Click **Schedule**. The file will then publish on the target date defined when setting the action.

Scheduling a Stale Reminder

Purpose: To understand how to schedule a reminder.

Objective: Set a stale reminder.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Hover over a page's row to display the available actions and select **Reminders** from the **Edit** menu.
3. In the **Reminders** modal, select the checkbox for the **Stale Reminder** tab to enable the reminder.
4. Set the timeframe for the reminder to go stale using the **Stale After** field.
5. Select a target user to receive the reminder from the **Send To** drop-down.
6. Then include a **Subject** and **Message** that details the reminder information.
7. Click **Save**.

Reverting Content to a Previous Version

Purpose: To understand how Revert functions.

Objective: To revert the current version of the page to a previous version.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Check out a page by clicking the page's lightbulb icon so that it turns yellow.
3. Hover over a page's row to display the available actions.
4. Select **Versions** from the **Review** menu.
5. In the **Versions** view, hover over a page's row to display the available actions and select **Revert**. A **Compare** may be done prior to the revert.
6. In the **Revert** modal, a message is displayed prompting the user to confirm or cancel.
7. Click **Revert**. The page version will be replaced with the version defined using the action.
8. In order to have the change reflected on the production server, click **Publish** in the Page Actions toolbar.

Creating and Editing Additional Content

Creating a New Page

Purpose: To help users understand how to create new content within OU Campus.

Objective: To create a new page.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Navigate to the desired location and click **New**.
3. In the **New Content** modal, choose a template from the list.
4. Complete the template's form fields.
5. Click **Create**.
6. Make edits to the page and save.
7. Repeat and use a new type of template.

Edit Images

Purpose: To understand how to utilize the image editor.

Objective: To edit an image using the OU Campus image editor.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Navigate to the `/_resources/images/campus` directory.
3. Hover over the image's row and click **Image** from the **Edit** menu.
4. Alter the image using the Image Editor.
5. **Save** the changes.

Uploading Content

Uploading a File from the Pages List View

Purpose: To understand how files are uploaded to a site in OU Campus.

Objective: To upload several different standard file types from the Pages list view.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Navigate to the directory in which the content will be uploaded.
3. Click **Upload** to open the **Upload** modal.
4. Select **Standard** from the **Upload Type** parameter.
5. Click **Add Files** to open the file browser, or drag and drop the files directly into the **Upload** modal from any external source including the user's desktop.
6. Click **Start Upload**.
7. Verify that all files were uploaded.

Assets

Creating a New Basic Asset

Purpose: To understand how basic assets are created and how these assets differ from Live Delivery Platform (LDP) assets.

Objective: Create a Web Content, Source Code, or Plain Text Asset.

1. Navigate to the **Assets** list view by selecting **Content > Assets**.
2. Click **New** and select **Web Content**.
3. Create an **Asset Name** and **Description** in the **Asset Info** panel.
4. Include **Tags** to help users find the asset when performing a search.
5. Create the asset by adding content to the **Asset Content** panel.
6. Click **Create**.
7. **Publish** the asset.
8. Repeat to create a **Plain Text** asset.

Creating an Image Gallery Asset

Purpose: To understand how Image Gallery assets are created and how these assets differ from other types of assets.

Objective: Create an Image Gallery Asset.

1. Navigate to the **Assets** list view by selecting **Content > Assets**.
2. Click **New** and select **Image Gallery**.
3. Create an **Asset Name** and **Description** in the **Asset Info** panel.
4. Include **Tags** to help users find the asset when performing a search.

5. In the **Gallery Options** panel, define the **Maximum Thumbnail** size and choose whether to **Crop** the images or preserve their **Original** aspect ratio.
6. Click **Create**.
7. In the **Images** panel, click **Add** or drag and drop files from the desktop to upload images to the gallery.
8. For each image added to the gallery can include a **Title**, **Description**, **Caption**, and **Link**.
9. Click **Save**.
10. **Publish** the asset

Inserting an Asset with the WYSIWYG Editor

Purpose: To understand how assets are managed and inserted into pages using the WYSIWYG Editor.

Objective: Insert an asset onto a page using the WYSIWYG Editor and observe the results.

1. Navigate to the **Pages** list view by selecting **Content > Pages**.
2. Navigate to a desired page and click **Edit**.
3. Select an editable region to open **JustEdit**.
4. Select an area within the editable region where the image will be inserted and click **Insert Asset**.
5. In the **Select Asset** modal, select the asset from the list. A preview is displayed to the right of the list when an asset is selected. Optionally, filter the list with the Filter tool to restrict the results displayed in the list.
6. Click **Insert**. The asset will be inserted into the editable region where the cursor is placed and will not render properly until the page is published and is viewed live.
7. Repeat for any additional assets to be added.
8. Save the changes.
9. **Publish** the page.
10. Navigate to the live page in another tab.
11. Navigate to the **Assets** list view by selecting **Content > Assets**.
12. Select and **Edit** the asset just added to the page.
13. **Save** the changes.
14. **Publish** the updated asset.
15. Reload the live page.
16. Observe the changes.

Gadgets

Enable / Disable Sidebar Gadgets

Purpose: To understand how Sidebar Gadgets are accessed in OU Campus.

Objective: Enable and disable a sidebar gadget.

1. Expand the **Gadgets** sidebar by selecting the **Expand** icon in the top right of any view.
2. Select the **Cogwheel** icon to display the **Choose Sidebar Gadgets** modal.

3. Enable a gadget by clicking on the corresponding item in the modal. When a gadget is enabled it is highlighted in green.
4. Repeat steps 1-2 to enable or disable any desired gadgets.
5. Click **Close**.