OU Campus
End-User Manual

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Contact Tish Sailer with comments or questions regarding this Manual.

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Introduction

This Manual is meant to be a general reference providing instruction on the most commonly used features. It is not an all-inclusive manual of the functionality included in the OU Campus system.

Help Documents and Support

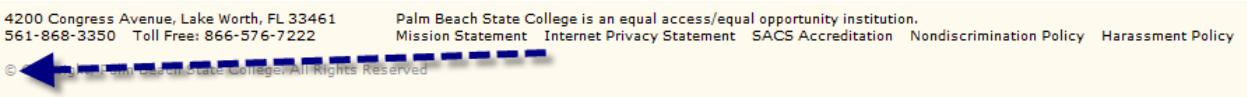
Additional help docs are available on the PBSC Web Standards page: www.palmbeachstate.edu/Web with more detailed instructions on specific topics [#]. You can access this page on the live site and you can also get to it inside OU by clicking the Add-Ons tab in the top left corner of the OU toolbar. For one-on-one help, contact Tish Sailer who can assist via email, phone, IM and/or desk-side coaching.

Accessing Pages and Login Steps

To edit or add new pages, login by using the DirectEdit Link or navigate through the Site Tree Folder.

Live Site using DirectEdit Link

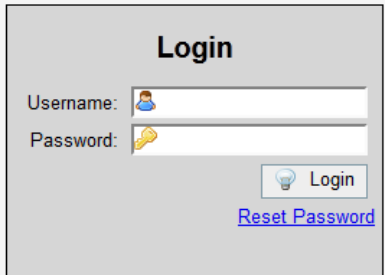
Palm Beach State's DirectEdit link is the **copyright** symbol found on every page of the website in the footer in the bottom left corner.



To edit or add a page, find your area on the live site and then:

1. Click on the DirectEdit link.

2. Sign into OU Campus using your normal College ID and password (do not use @palmbeachstate or @pbcc).



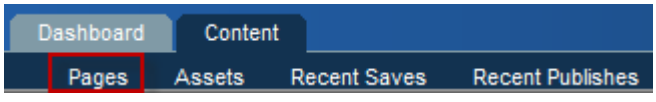
If you click the DirectEdit link on a page you don't have permissions, you will be able to login but you will get an error message. This is ok - you are logged in. Use the site tree to navigate to your pages.

Note: Once logged in, clicking on the DirectEdit link from any page on the live site will open OU Campus directly to that page without having to log in again.

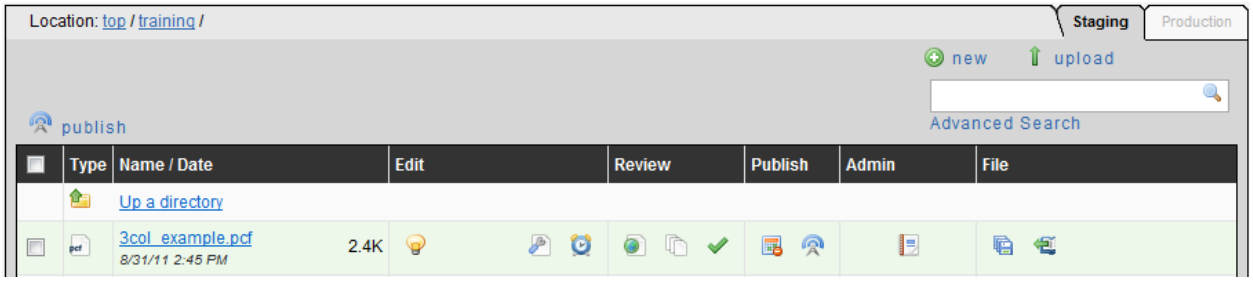
OU Campus Using Site Tree

Once in the OU system, you can access pages by either:

1. Going onto the live site, finding the page to edit, and clicking on the DirectEdit link, or
2. Navigating through the Site Tree folder structure. Click on Content and then Pages.

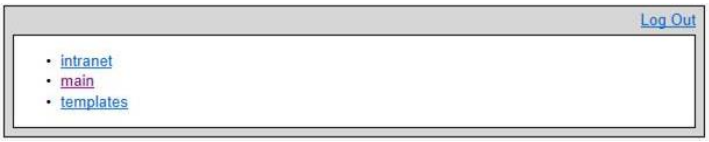


Use the folder structure found in the view below to navigate to the page that needs to be edited. If access to a particular folder or page has not been granted, the folder/page will show up as plain black text instead of a hyperlink.



Once the page to be edited has been identified, simply click on the light bulb to check the page out, or click the page name to access it directly.

NOTE: If you should see this screen → choose MAIN to access the College pages.



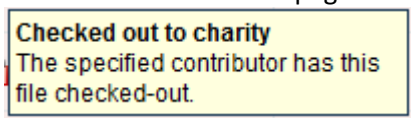
Checked Out Pages

Pages are marked as "checked out" when they are locked to a user. Only one person at a time can check out and work on a page. There are different indicators as to why a page is marked as checked out.

- An unlit light bulb indicates that the page is checked in and can be checked out for editing.

- A lit light bulb indicates that the page is checked out to the current user.

- A red lock indicates the page is checked out to another user. It is possible to hover over the lock to see to whom the page is checked out. This will appear in a little pop-up.



- A thumbs up indicates that the page is checked out to the current user (who is a designated approver) as part of the workflow process.

- Two chat bubbles indicate that the page is checked out to another user as part of the workflow process. The page is waiting for approval from that user. Hover over the chat bubbles to see to whom the page was sent for approval.

Checking a Page Back In

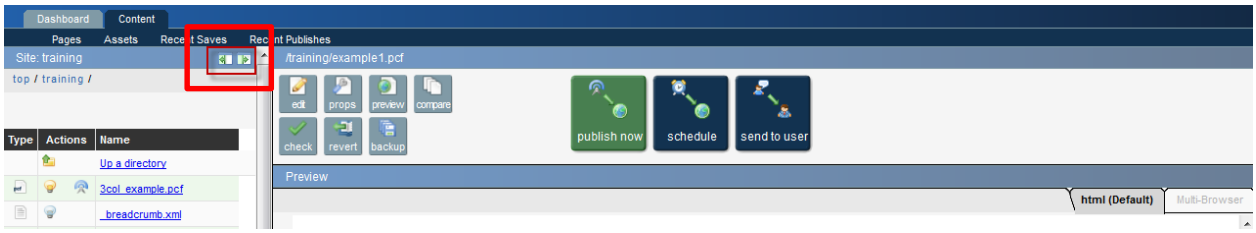
It is important to note that pages and Assets stay checked out to the user until the user:

1. Publishes the page.
2. Checks the page back into the system by clicking on the lighted (yellow) light bulb from either the folder structure or the Current Projects view found in the Dashboard > Current Projects tab.

Make sure to check the page back once you are done so it can be made available to other users.

Special Note – Navigating Between Frames

To navigate between views (single-pane as shown on previous page or double-pane as shown below), click on the TINY green arrows found at the top of the Content-Pages view.

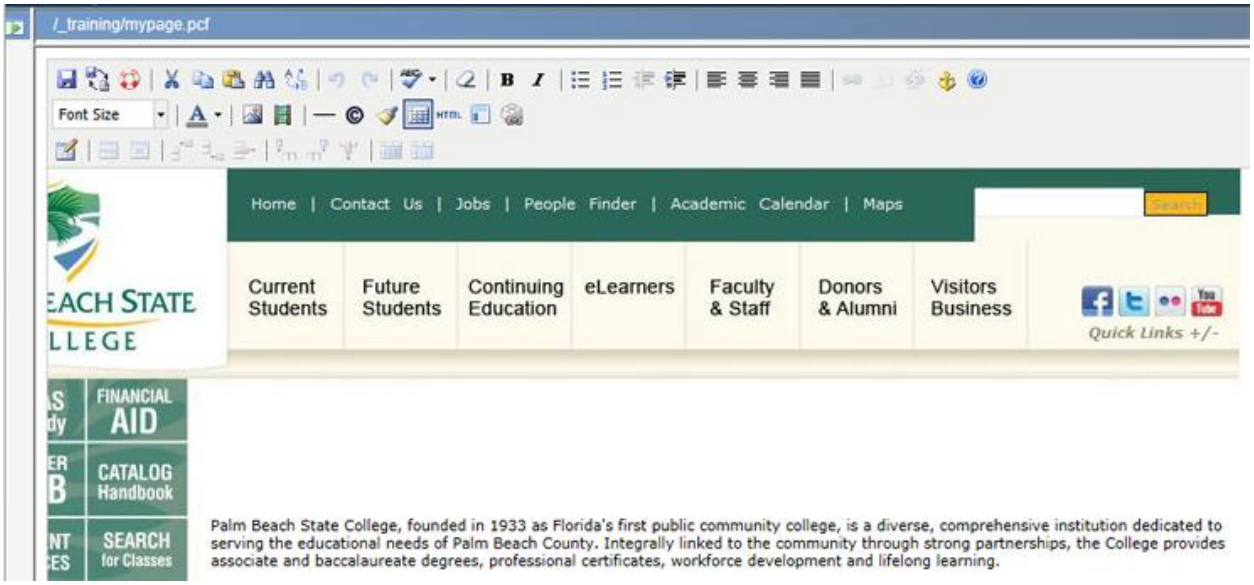


Click on the left or right arrow to navigate to a full page view or a split-screen view, as needed. The arrows move with the window, but always appear at the top of the page.

Editing a Page

After navigating to your page, the edit buttons will appear.

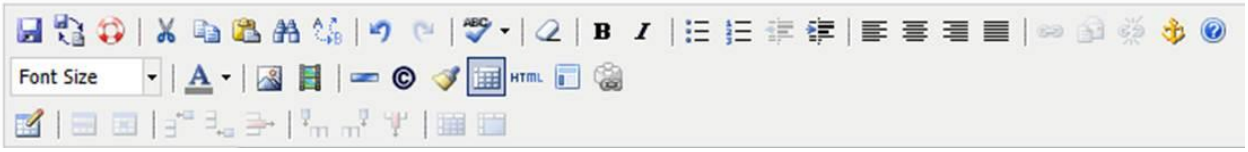
Click on the Edit button until you see the WYSIWYG Editor toolbar (as shown in the image below). Now you are ready to edit your page.



Note: The top image (Current Students, Future Students, etc.) is only a placeholder to show how the content will appear on the page. Once the content has been saved, the actual preview will come up for you to review and test links.

- Make any necessary edits and then **Save**.
- Once you are done editing, **Send** the page for Approval and Publish to the live site.

WYSIWYG Editor



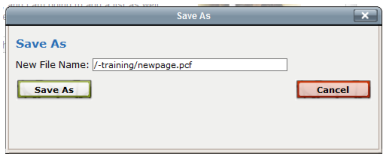
The WYSIWYG Editor includes basic editing functions. Below are some of the most common features. For more details on what the various toolbar icons mean, visit the OmniUpdate Support site.

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.

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. When the Save As icon is clicked, a box will pop up prompting the user to provide the new name. Change the name of the page, but leave the extension of .pcf. This is extremely important. If any other extension is used, the page will not work.



Paste Option

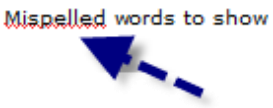
- The paste button pastes in only plain text, stripping all other formatting.

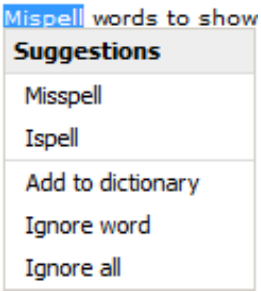
Link Icons

- The first icon is to Insert or Edit a link. The second icon is to add a link to an email. The third icon is to break a current link. The icons are not active unless your cursor is on a current link or you have text highlighted to add a new link.

Spell Checker

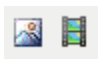
- The spell checker can be activated by clicking on the ABC with the checkmark. The default dictionary is English. Misspelled words are identified with a wavy, red line. To fix the misspelled word, click on it. This brings up a window with available options. Select the correct word, ignore the word, or, if access has been granted, add the word to the dictionary.





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

Media Insert

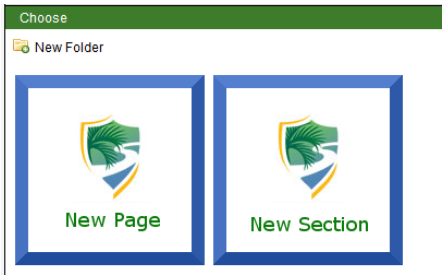


- This provides an easy way to include images and videos on the web page. When inserting media, it is possible to select from images and videos that have already been uploaded or it is also possible to upload new images yourself. External resources, such as YouTube videos, can be manually identified as well. Images uploaded to the wrong folder will be deleted. You must upload images to your area folder. Videos must be uploaded by MTIS to the Media Server.

New Pages and Sections/Folders

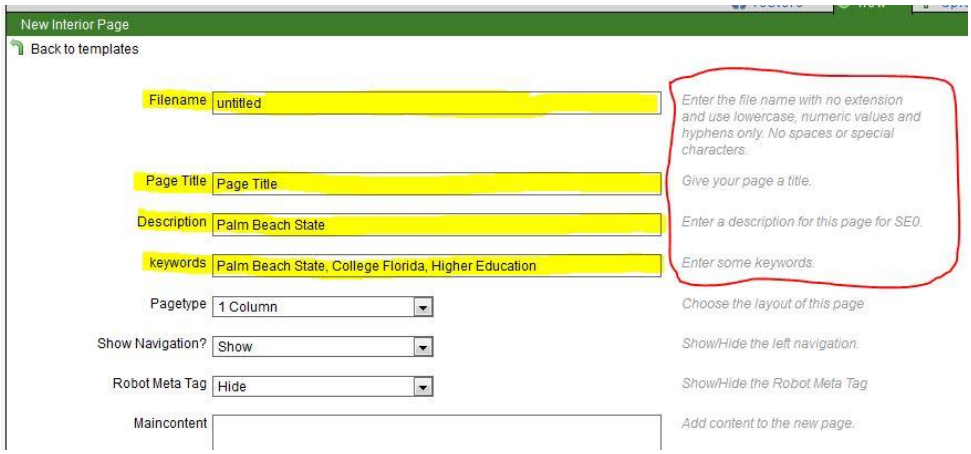
In addition to editing pages, you may also create new pages and folders. To do this, you must be in the single-pane view. If needed, use the small green arrows to expand the window to this view. Keep in mind that creating a New Section means pages in that folder will have a different Nav Bar than pages in your main area folder. Most times, you will only want to create a new page.

To create a new page or folder, click on the "New" button.



To create a new page, select the New Page icon.
To create a new folder, select the "New Section" icon.
Each selection will have fields that must be completed for the page or folder to be configured. Complete the requested info.

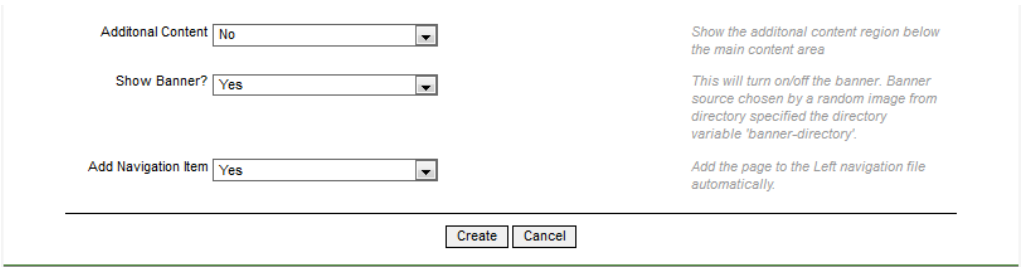
Important note: Keep the .pcf extension when naming pages. Otherwise, the page header, footer, and style will not be correct.



Follow the guidelines and helpful tips (shown in gray in the right hand column) to complete the required fields.

The top 4 highlighted fields are the ones you need to complete.

The other fields can remain with the defaulted info.



After clicking "Create," you will be able to come back and edit these fields at a later time, if needed.

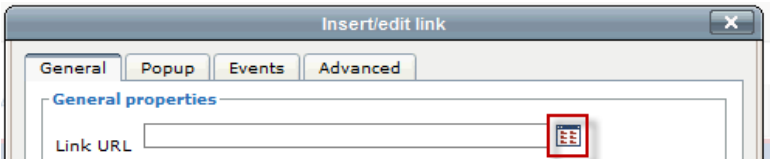
You can now add text, links, images, videos, tables, etc. on your new page.

Creating and Editing Links

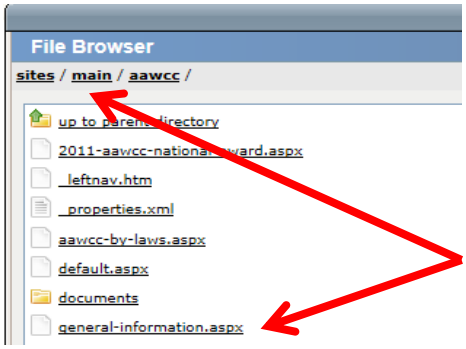
Links are created by highlighting text & clicking the "Insert Link" icon in the WYSIWYG toolbar. The "Insert Link" icon will be grayed out until the text or image is selected. Links can point to internal pages, external sites, PDF files, images, videos, etc.

CREATING LINKS:

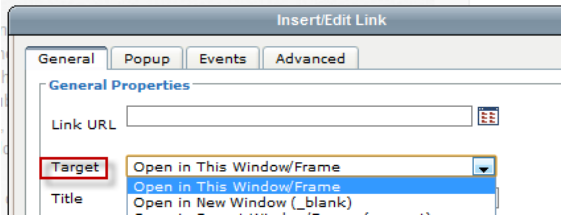
To link to an INTERNAL **page** (another PBSC web page) , click the "Insert Link" icon and then click on the browse button. [*this browse step is critical for Dependency Manager to work*]



Navigate to the page you want the link to point to. If the desired page is not in the current folder, you will need to use the breadcrumb at the top of the page and the site tree folders to navigate to the desired page. Click on the page and then choose "Select File". Insert and Save to preview and test the link.

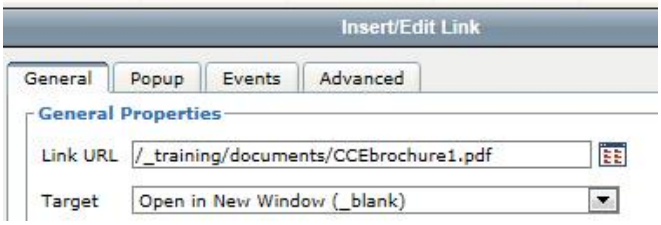


When linking to an **internal** page, the link can open in the same window (the default) or new window - as you prefer. When linking to an **external** website or to a **document**, the page should always open in a New Window. This selection is made in the field labeled "Target."



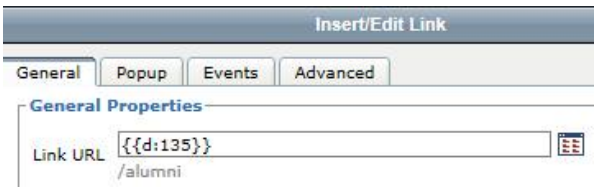
Complete the "Title" field with a brief description for use by screen readers and site compliance checks.

To link to an **EXTERNAL web site**, highlight text and click the Insert Link icon. Type in or copy/paste the URL into the "Link URL" field and choose New Window in the Target field. Insert, Save, Preview, Test.



To link to a **DOCUMENT**, highlight text, click Insert Link icon. Browse to find the document you want to link to. This may be a PDF already in the Documents folder or you may upload a new document. [see upload doc directions] Select File, Insert, Save, Preview, Test.

Links and Dependency Manager: Dependency Manager automatically updates the hyperlink if the target page is moved or renamed. That's why it is so important to browse for the internal page, as described above, to ensure Dependency Manager will work. When inserting a link using Dependency Manager, instead of the URL appearing in the "Link URL" field, a Dependency tag code will be seen. You can still see where the link is pointing as the target URL will appear directly underneath the "Link URL" field in gray text.



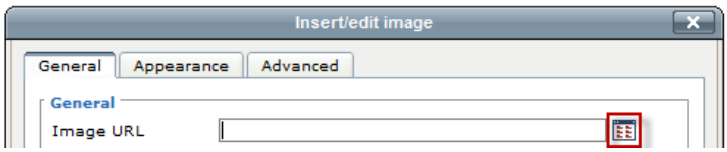
**** TO EDIT A LINK, CLICK ONCE ON THE LINK TEXT & CLICK THE LINK ICON IN THE TOOLBAR ****

Inserting Images & Uploading [#]

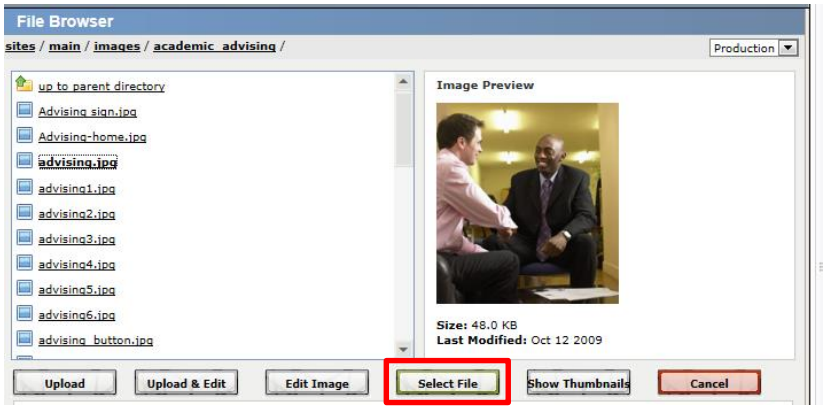
Insert Images:

1. Click on the "Insert Image" icon in the WYSISYG edit toolbar:

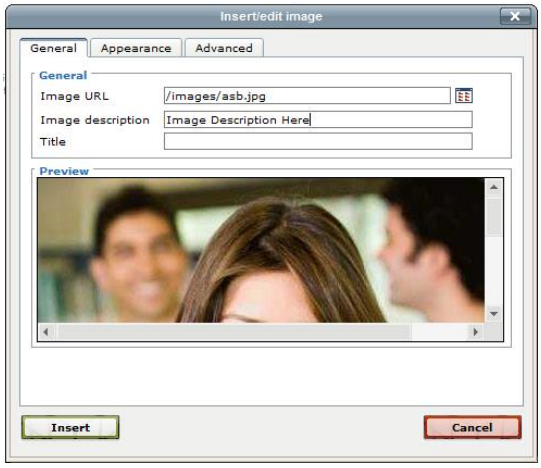
2. Click on the browse button next to the "Image URL" field, and find the image to be inserted. If you are not automatically taken to the Images folder for your area, you may have to navigate there. *(contact Tish Sailer to set up this automation)*

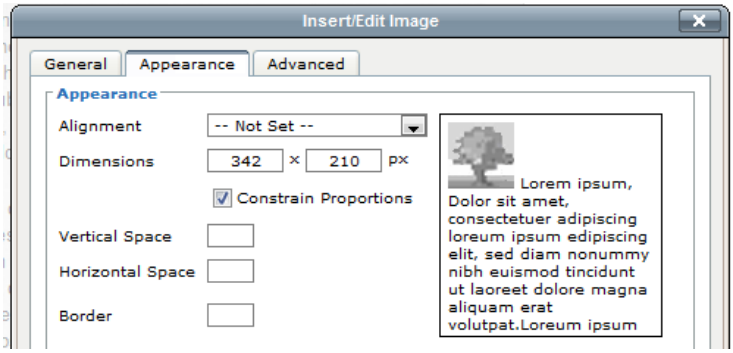


3. Click on the desired image to see a preview and then click "Select File" to choose it.
   - You may click "Show Thumbnails" to see thumbnails of all of the images within the folder to more easily select the desired image. However, if the folder is too full, the thumbnail images will not be able to display.



4. After selecting the image, add a short "Image Description"
   - This is required and will be used by screen readers and to ensure accessibility standards compliance.





5. Appearance Tab: If desired, update the "Alignment" field (left or right) on the Appearance tab to allow the text to wrap around image.
   - Always size your image BEFORE upload but small dimension adjustments can be made here.
   - To add some space around the image, use the "Vertical Space" and "Horizontal Space." This is done in pixels and generally between three (3) and five (5) will provide enough.
   - A "Border" is also identified in pixels. Leave blank or 0 for no border. If you want a border, two (2) should normally be sufficient.

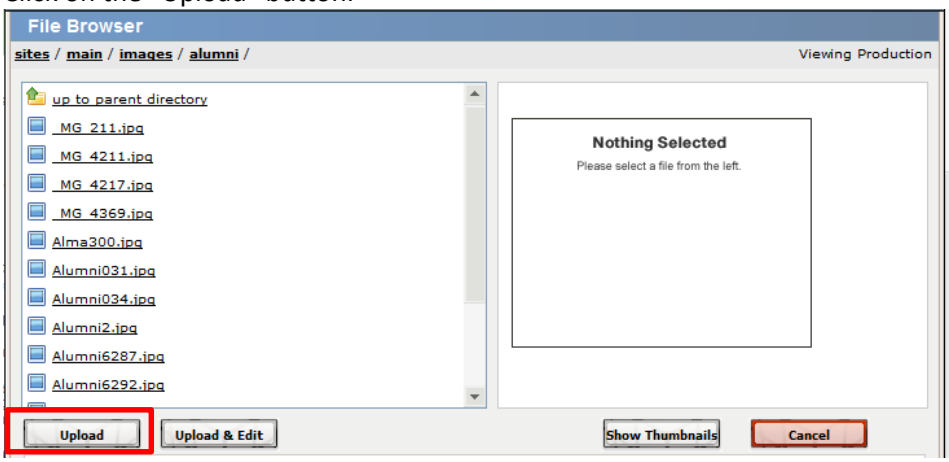
6. Click "Insert" [Additional settings are available on the Advanced tab]

If the desired image has not already been uploaded, it can be uploaded from the screen that pops up when the browse button is clicked. See below for more directions.

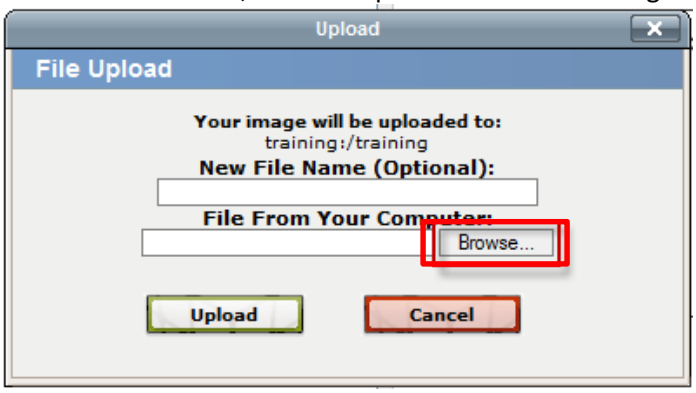
Uploading New Images:

Click on the "Insert Image" icon in the WYSISYG edit toolbar. Click on the browse button next to the "Image URL" field. If you are not automatically taken to the Images folder for your area, you may have to navigate there. *(contact Tish Sailer to set up this automation)*

1. Click on the "Upload" button.



2. Browse for the desired image file on your computer that you wish to upload. (If you choose to rename the file here, use the top field as shown in image below and include the file extension)



3. After finding the desired image file on your computer, click "Upload"
4. You should get a message that the file was uploaded successfully. Click okay to continue.
5. Find the newly uploaded image and select it to insert the image on the current page.

HELPFUL TIPS - When uploading images, keep in mind that the image should:

- be resized BEFORE you upload it to your images folder in OU Campus
- be no larger than 740 pixels wide which is the max width of the white space
- have no spaces, underscores or special characters in the file name (you may use a - dash)
- be a photographic image - no cartoon or animated images are allowed
- be of good quality and not stretched out of proportion or they are subject to removal

NOTE: Images uploaded to the wrong place will be deleted, causing a broken link on your page.

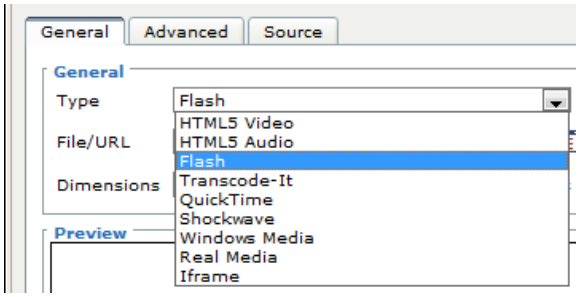
Editing Images:

Resize and crop images **BEFORE** you upload them using Photoshop, MS Picture Manager, Windows Live Photo Gallery or numerous other photo editors. To edit an image already on a page, click once on the image to highlight it and then click the "Insert Image" icon to bring up the Insert/Edit Image window.

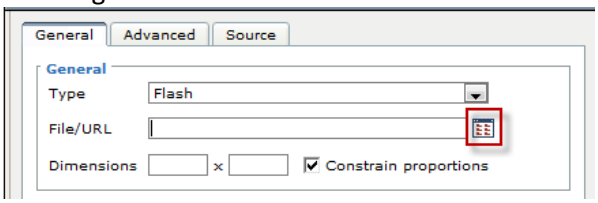
Inserting Media [#]

To insert a video or audio file:

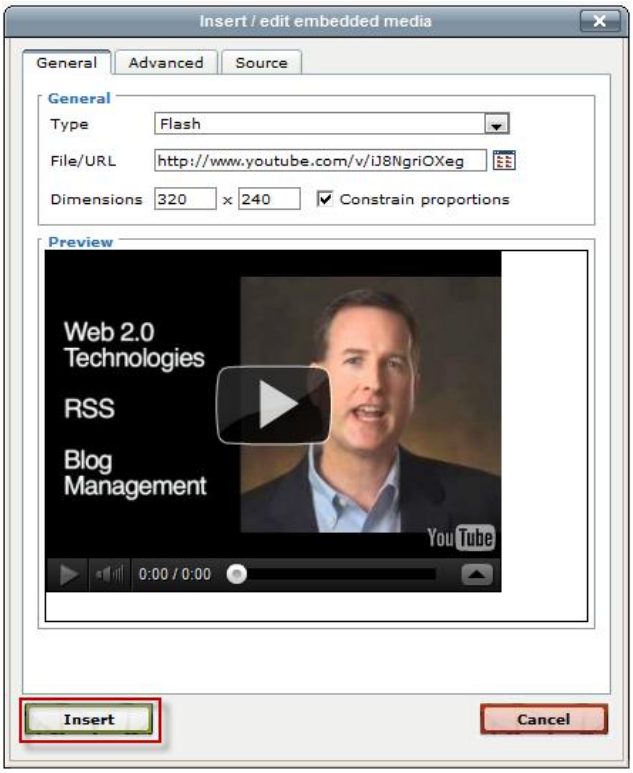
1. Click on the “Insert Media” icon:
2. On the resulting pop-up, select the format in which the media should be inserted. The default is “Flash.”



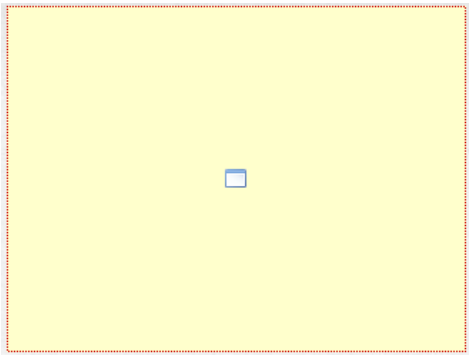
3. Enter the URL to the external media or click on the browse button next to the “File/URL” field, and find the image to be included.



4. If browsing for media in the file chooser, simply navigate to and click on the desired file, similarly to browsing for images.
5. Click “Select File.”
6. Update any other settings that may need to be updated. The settings in the “Advanced” tab will be dictated by the “Type” selection made on the “General” tab.
7. Click on “Insert.”



The media will not render within the WYSIWYG Editor.



Instead it will appear as a yellow box the size of the intended media.

Once the page is saved, the video will render in the preview.

Media files must be uploaded to the Media server by MTIS.

Inserting a YouTube Video

Inserting a YouTube video is especially easy.

1. Find the video on YouTube.
2. Copy the URL for the video from the address bar.
3. Go back to the page, and place the cursor at the location where the video should be displayed.
4. Click on the “Insert Media” icon.
5. Paste the URL into the “Link URL” box.
6. Click on “Insert.”

If desired, the dimensions can also be updated to define the size of the displayed video.

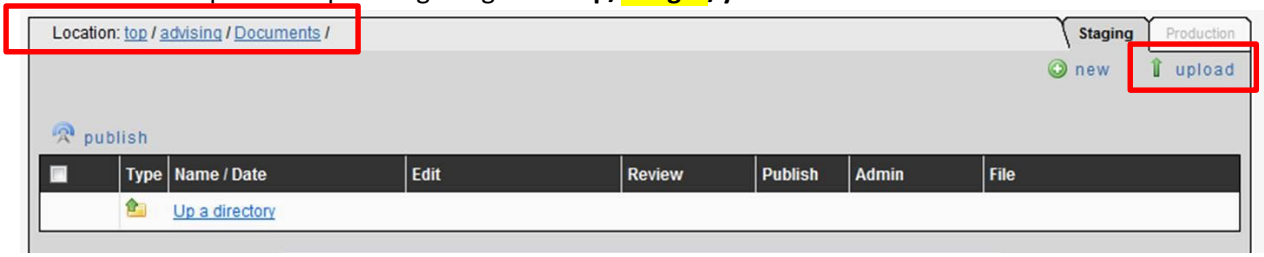
Uploading & Overwriting Files [#]

Documents and Images may be uploaded two ways **- inside** a page you are editing or **outside** a page. These directions are for outside a page. This option allows you to upload several documents or images and allows you to OVERWRITE one that already exists in the folder. **IMPORTANT: Do not use spaces, underscores or any other special character** (except dashes-) in document or image file names!

Navigate to your Documents or Images folder. In the single-pane view (use green arrows if needed to expand to single-pane view), click Upload (found in the upper, right-hand corner). You must be in the correct location to upload or you will get an error message about an incorrect extension.

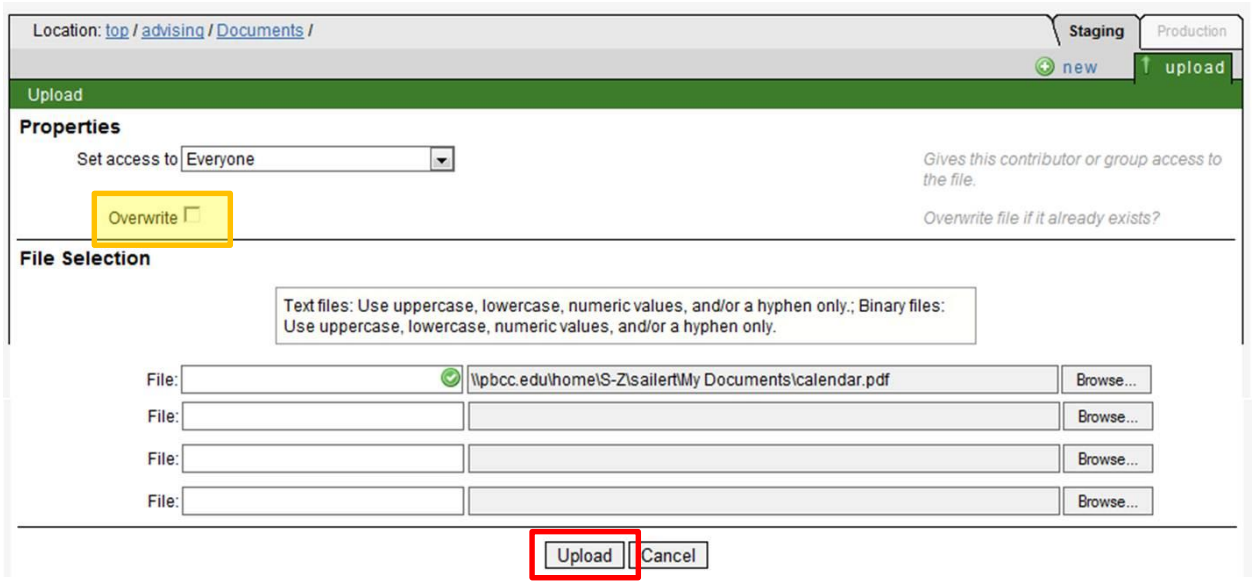
The correct path for uploading documents is: **top/yourfolder/Documents**

The correct path for uploading images is: **top/Images/yourfolder**



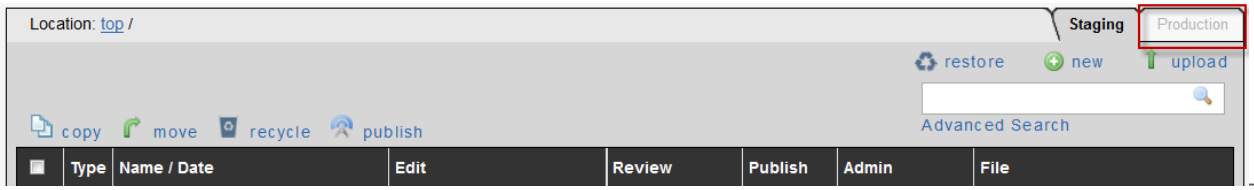
1. If you want to "Overwrite" a previously uploaded file, check the box. If not, proceed to step 2.
2. "Browse" for the file on your computer that you want to upload. Repeat this browse step for as many files that you want to upload (the max is 10 per screen)
3. Click "Upload" button at bottom center of the screen. Click the Content tab to return to area.

Note: To Overwrite, the file name must match exactly. All Uploads are immediate & need no approval.



Verifying Uploaded Files

All files (PDFs, DOCs, images, etc.) are uploaded directly to the Production Server, even though the Staging Server is used to perform the upload process. To verify that the files have been uploaded correctly to the Production Server, click on the "Production" tab to see the list of uploaded files.

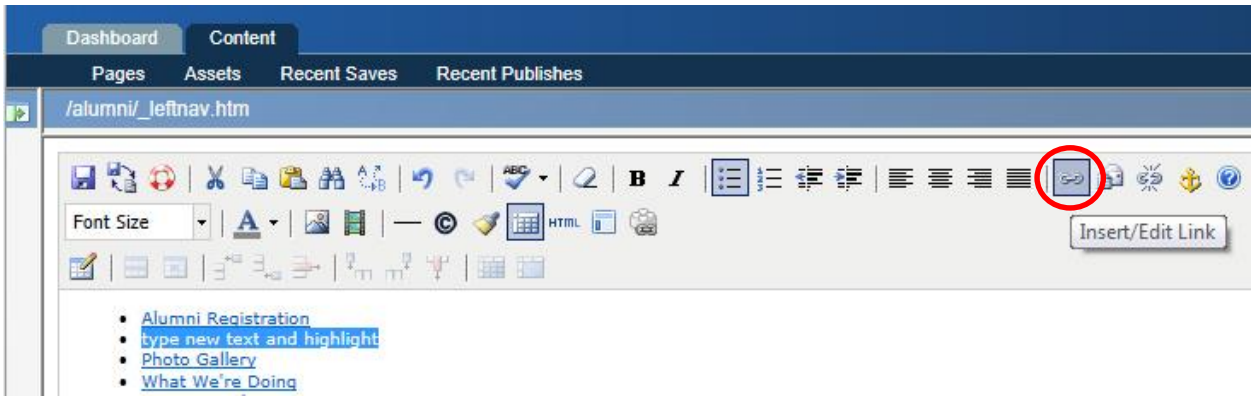


Editing the Nav Bar [#]

To add or remove anything from the Nav Bar (blue column running on the left side of your web page) - you must edit the **_leftnav.htm** file found at the top of your web area in the site tree list.

To **Delete** something from the nav bar, backspace to remove or highlight the unwanted text and hit the delete button on your keypad. Save and Send for Approval and Publish.

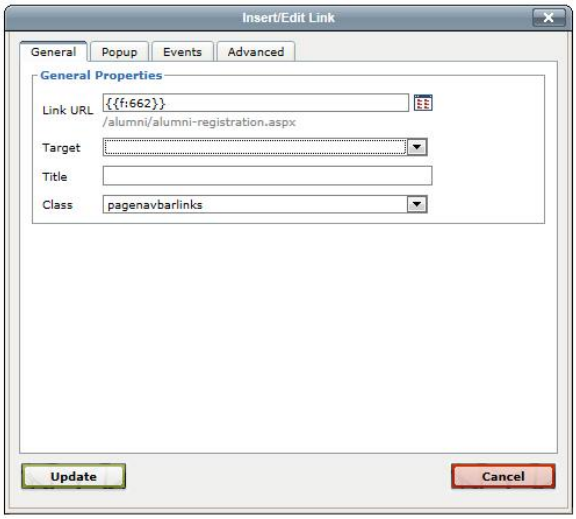
To **Add** something, insert the cursor where you want the new line to be and type in the new text.



Highlight the text and right-click (or click the Link icon in the toolbar) to open the Insert/Edit Link window ---------->>>

Browse to find the document or internal page you want to link to - or - type in the URL if you want to link to an external page. Target = New Window if linking to Document or external website. Update.

Save and Send for Approval and Publish.



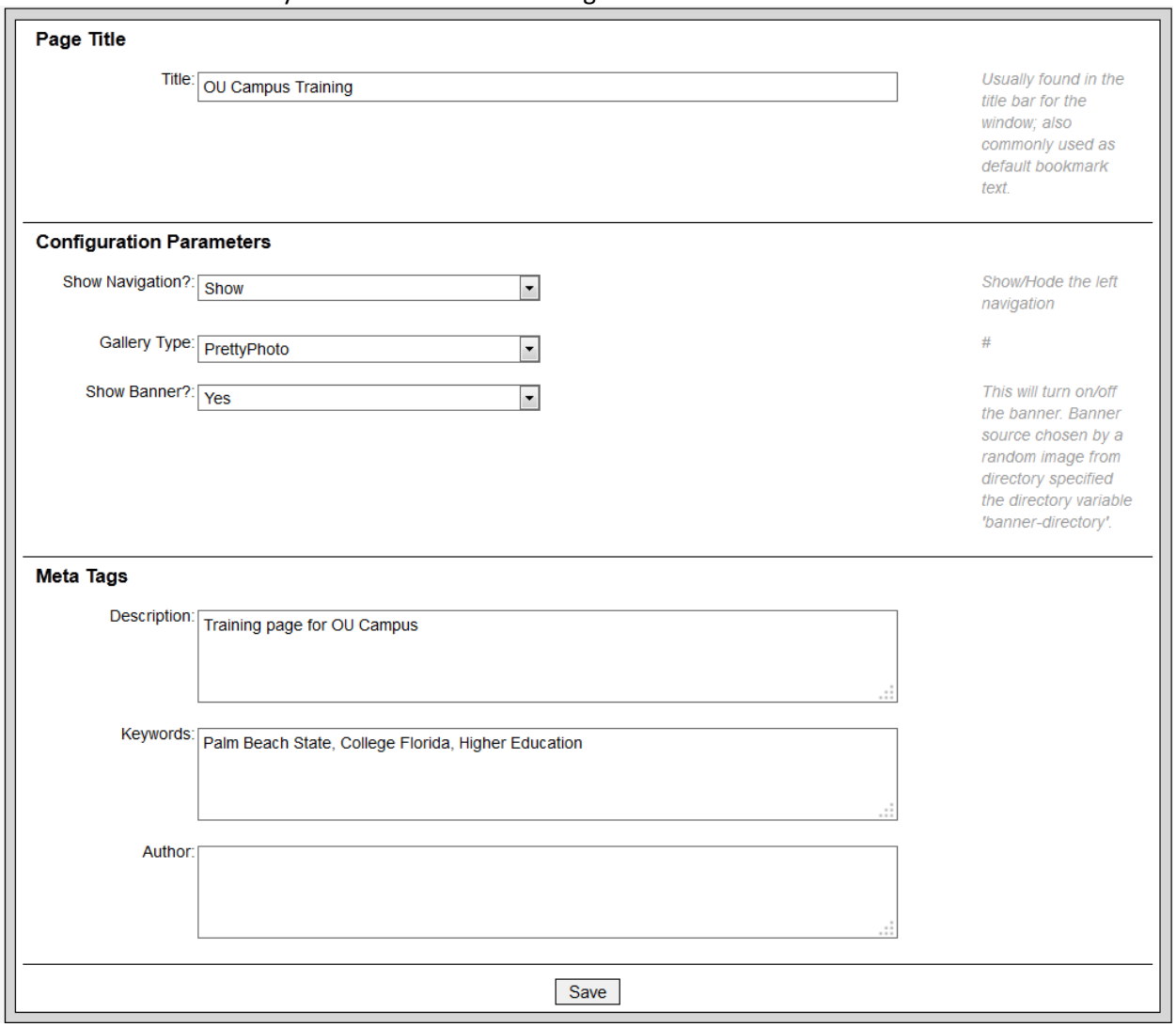
Page Properties - Editing Page Title [#]

After creating the page, some Page Properties may need to be added and/or modified.

Some Field examples are: Title, Description, and/or Keywords.
To access the Page Properties, click the “Props” button.

(you must edit or check the page out first to be able to see and select the props button)

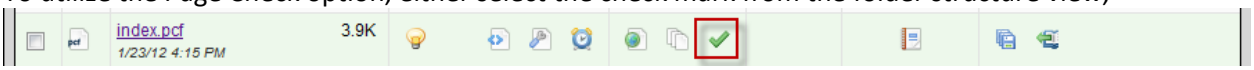
Alter or add the necessary details and save the changes.



Page Check / Proofing

Page Check is a feature that allows users to check a page's spelling, links, compliance with W3C (http://www.w3.org/), and compliance with accessibility standards prior to sending for review, approval, or publishing. It is possible that none, all, or some of these features will be available.

To utilize the Page Check option, either select the check mark from the folder structure view,

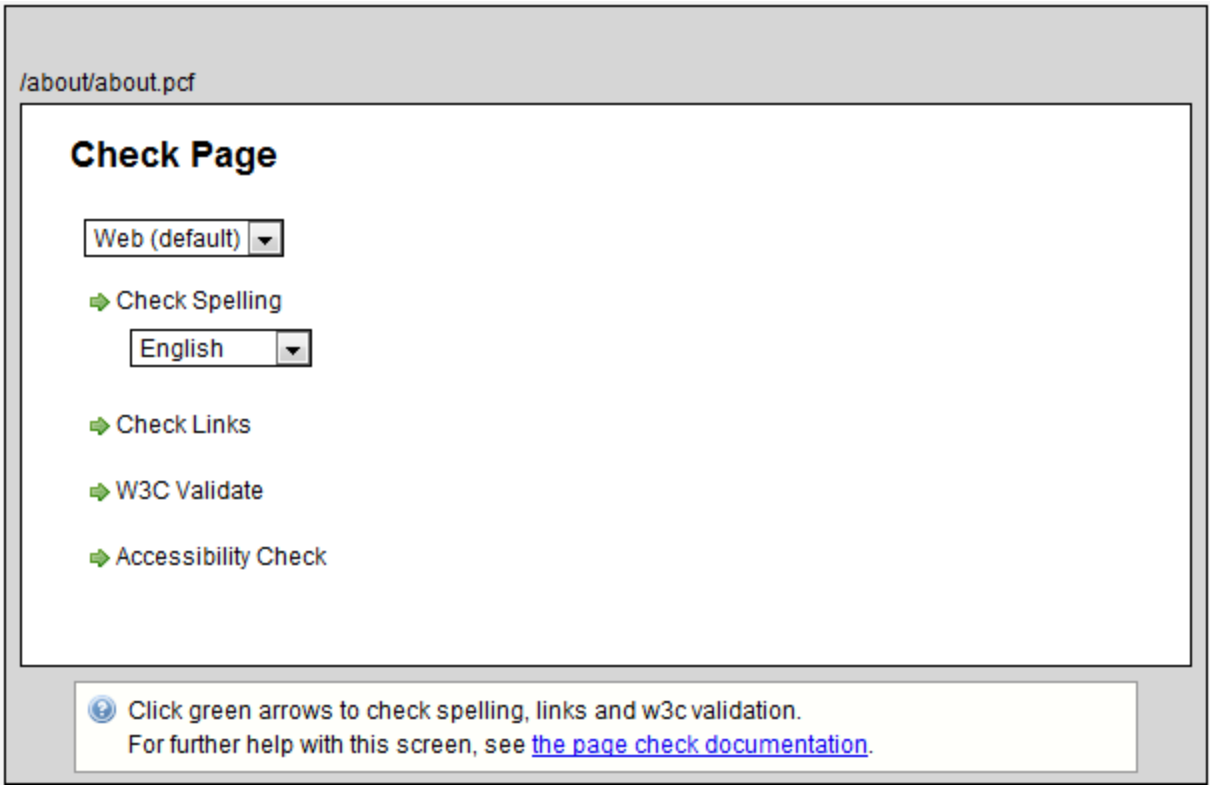


or the "Check" icon in the page options at the top of the page.

This opens a box with different options.

1. Select the output type to be checked from the drop-down. (Only one option may appear.)

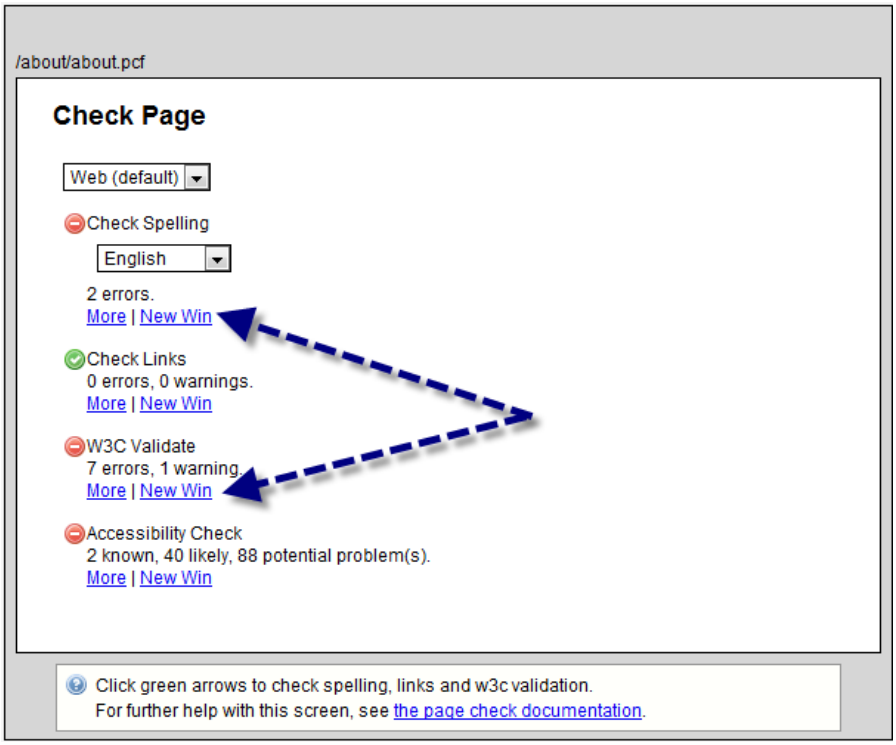
2. Click on the green arrow in front of the option(s) desired in order to run the check(s).
   For the "Check Spelling" option, select the language for which the page should be checked.



After the check has been run, the results will appear under each option. If there are errors or warnings, they can be viewed by clicking on the "New Win" link.

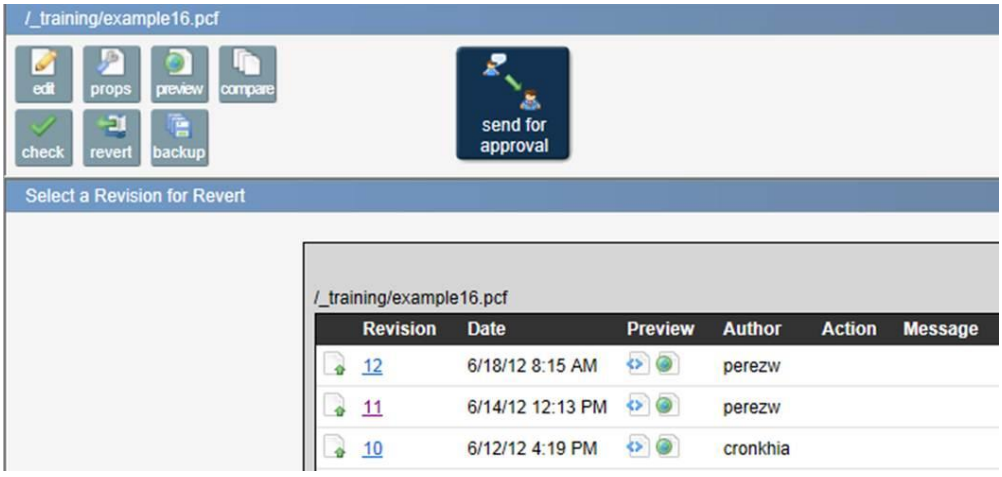
Before sending to another user for review or approval, or publishing the page, it is advised to fix the identified errors.

The options available will also be available during publish.



Revert to Previous Version

Revert allows you to restore any previously **published** version of a page. Each time a page is published, a version is stored that allows you to "revert" if necessary. To view the list of previous versions, check out the page and then click the revert icon. A window comes up that shows a list of versions that are numbered, dated, and a message, if one was left during the publish process.



Reverting a File
To preview what a version looks like, click on the Preview Icon. After deciding which version you'd like to revert back to, simply click the version number, then click "Yes". The selected version has now become the current version of the page on the staging server. You can now edit this page, or publish it to make it the live version on your website.

Note, after reverting a file, you must publish the file to make it live on the production server. Simply reverting the file does not publish the file. Should the user or individual file require approval, the file will be passed along the intended approval path before it can be published.

Send Pages for Approval

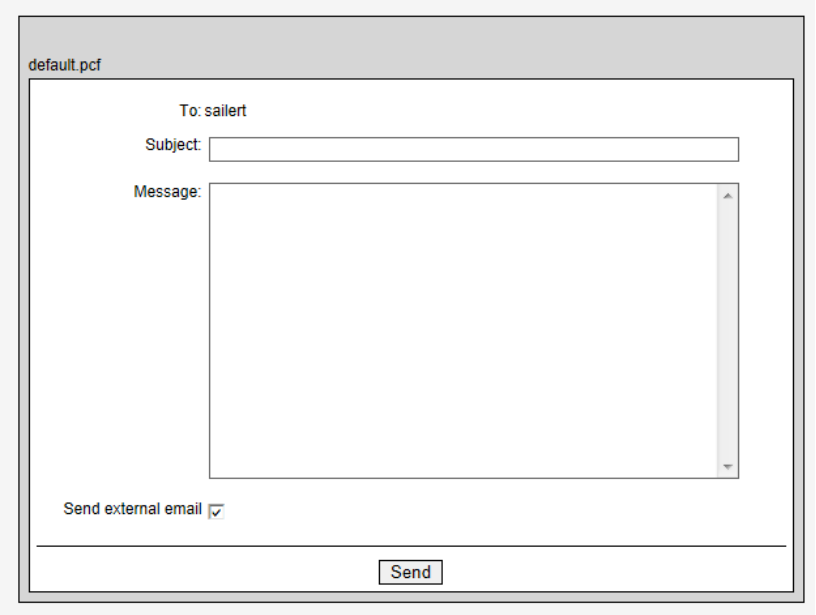
(FOR THOSE **WITHOUT** PUBLISHING RIGHTS**)** If "Publish Now" is not available, use "Send for Approval".

When the "Send for Approval" button is clicked, a mail window will appear. Sending the page to a user will transfer the checked out status from the current editor to the person to whom the page is sent.

1. The "To" field will be auto-populated with the approver name/email.

2. The "Subject" field is a required field. This is where you can enter "text change only" or if you have added and/or modified links, you should state which ones.

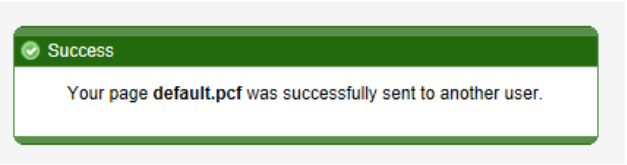
3. The "Message" field is available if you need more room to tell the approver what you have changed/updated. Giving this info will save time and result in a quicker publish process because the approver will not have to review the whole page.



4. The checkbox next to "Send external email" means the approver will also receive notification in their PBSC email as well as in OUcampus.

5. Click "Send."

You should receive a message that your page was sent.



Approval Time

Pages are generally approved anywhere between 5 minutes - 4 hours depending on the approver's schedule that day. Notification is not automatically sent but if you would like notification that your page was approved, include in the Subject line: **Approval Notification Requested**

Approval and Publish Declined

If there are issues with the submitted page, it may be Declined and you will receive notification of that. Your changes are not lost but you will be asked for further clarification or notified that specific further updates are needed and then you can resubmit the page for approval.

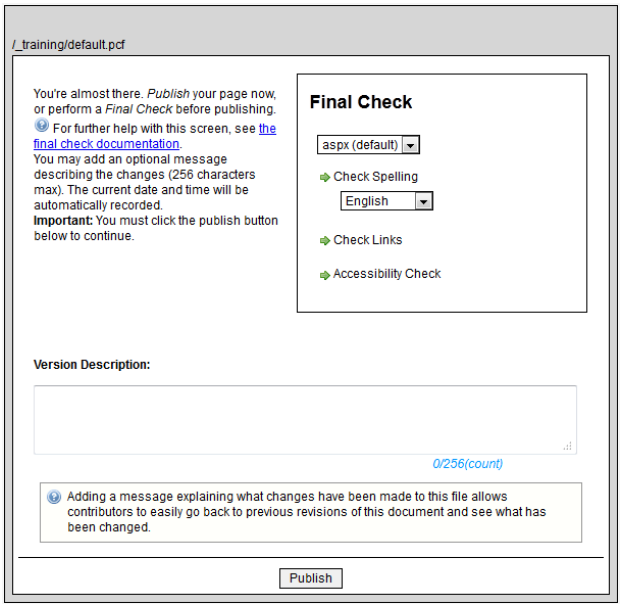
Publishing Pages

(FOR THOSE **WITH** PUBLISHING RIGHTS) Once a page has been edited, it can be published to the live site. The ability to publish pages is based on permissions, and not all users will see the "Publish Now" button.

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

Clicking the "Publish Now" button will bring up a publish screen. Within this screen the following tools may be found:

- Final Check – This allows a final spell check, link check, page validation, and accessibility check to be completed before publishing the page. Click the green arrow to run the final check.
- Version Description – This will allow a version description to be included to indicate what was updated and why the page is being published.
- Publish button

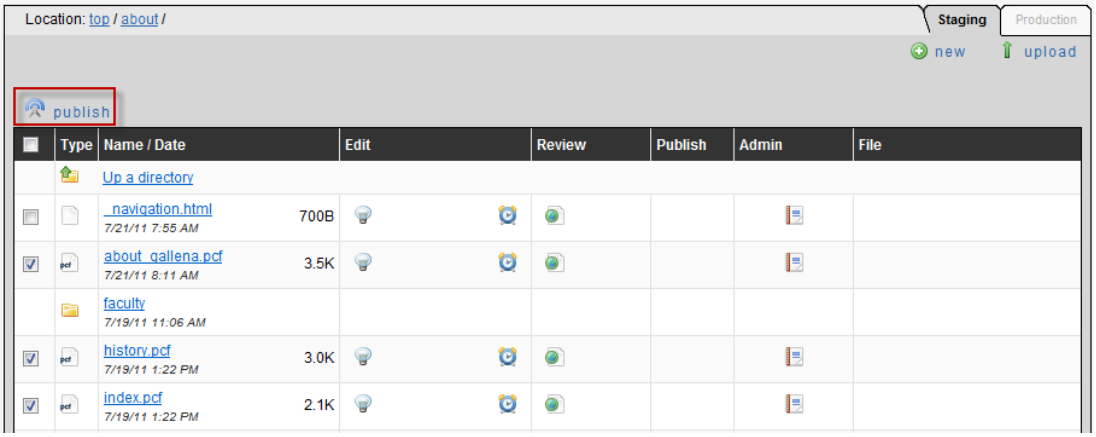


Once the publish is complete, the system will present a success message, which includes links to view the published page. Using "View in new window" will open a new window or tab and show the page on the live site.

It is also possible to publish multiple pages within a folder simultaneously. Keep in mind that doing this does not allow for:

- Final Check
- Version Description(s)

From within the folder structure, check the boxes next to the page(s) to be published, and click on the "Publish" icon found at the top of the screen.



Dashboard

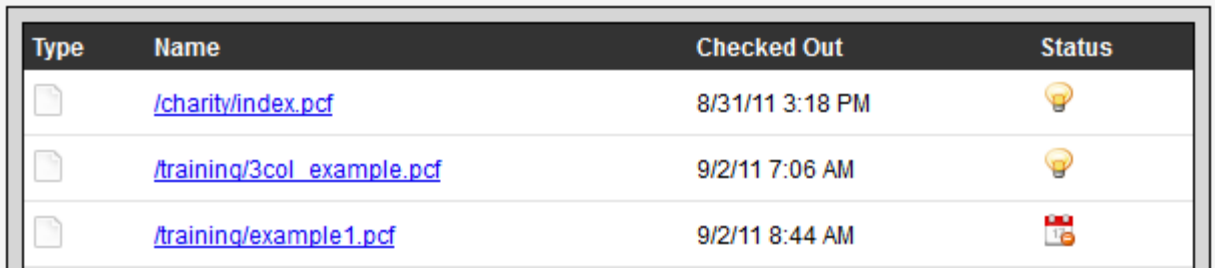
The Dashboard contains user-specific information. This document only talks about Workflow and Current Projects. Workflow is used for the approval process and Current Projects shows what pages you currently have checked out.

Workflow

Workflow includes the Inbox, Outbox, and Compose sections and is used by Reviewers and Approvers.

Current Projects

Current Projects lists the pages checked out to the user and why they are checked out by the icon under the Status column. Pages can be checked back in if appropriate from this screen, and scheduled actions can be updated as necessary. It is advised that this screen be checked prior to logging out for the day.



Type	Name	Checked Out	Status
	/charity/index.pcf	8/31/11 3:18 PM	
	/training/3col_example.pcf	9/2/11 7:06 AM	
	/training/example1.pcf	9/2/11 8:44 AM	

Share Desktop

Communicator allows you to share your desktop so that someone else can view what you are doing as it is happening. This is an invaluable tool when requesting help working within the OU Campus system. If you are having problems, call Tish Sailer at 207-5701 to see if she is at her desk and available for assistance. If available, follow these steps to share your desktop with her:

1) Locate Communicator either in the bottom taskbar of your computer or by clicking on the Start icon.

2) Send an Instant Message (IM) to Tish Sailer
3) Share your desktop by clicking dropdown next to the hand holding the monitor

4) You will now be able to communicate on the phone what steps you are taking in OU Campus that are not working and she will be able to walk you through the proper steps.

Headings that contain **[#]** mean there is a Help Doc available on that topic on the Web Help page at: www.palmbeachstate.edu/Web