



End-User Reference Guide



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End-User Introduction

OU Campus™ provides users an easy way to manage web pages. With the ability to login directly from the institution's website, it is easy to navigate to the page to be edited. Once logged in, users can simply click on the area to edit, and they are placed in a user-friendly What-You-See-Is-What-You-Get (WYSIWYG) Editor, also referred to as JustEdit.

The system allows an approval process to be put into place, which results in users either having the ability to publish pages once they have finished editing them, or they can send the completed pages to other users as defined by the workflow to gain approval prior to publication. The system has a built-in intelligence that allows the workflow process to be defined prior to page creation. Users do not have to understand which pages need approval prior to publication because the system tells them.

Pages are checked out to only one user at a time to prevent users from overwriting each other's work, but as the pages move through the workflow system, the system automatically changes to whom the page is checked out based on its placement in the workflow system. In addition, users can only access content to which they have permissions to edit. When creating new pages, preconfigured templates are made available to provide consistency in web page design. Users may also have the ability to upload new images, add words to the OU Campus dictionary, access full page source, and much more.

OU Campus Support

Online support is available through the OmniUpdate Support site at:

<http://support.omniupdate.com/oucampus10/>

The Support site, which is accessible by everyone in its entirety, includes user support on all the features in OU Campus, as well as video and text tutorials, archived Training Tuesdays, which are the free monthly webinars offered the last Tuesday of every month unless otherwise announced at 11:00 AM PST, and access to the Permissions Chart.



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 links found within OU Campus. Throughout the site the in-context help links are available and are specific to the area or task at hand. These links open the relevant page at the Support site.



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

The Support site is available to everyone. Users are encouraged to visit and search the Support site. The institution's administrators are also available if the answer cannot be found on the Support site or further explanation and clarification is needed. Administrators may contact the OmniUpdate Support Team.

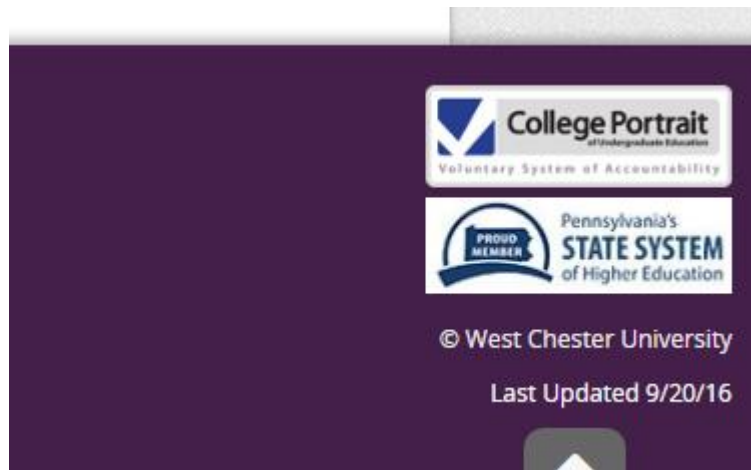
Logging In

Accessing Content Using DirectEdit

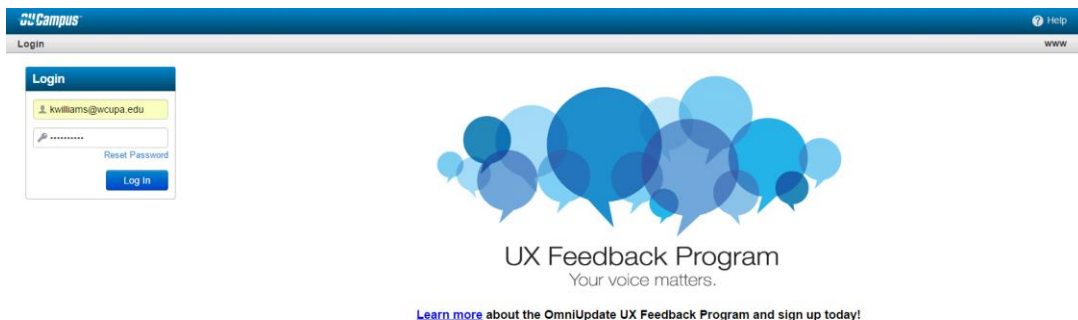
Content contributors and administrators alike can log in to OU Campus through a published page with the use of an on-page link known as DirectEdit™. DirectEdit can be a link, a button, an image, and more anywhere on a published page, as it can be styled to match the look and feel of the site. Typically, every page of a web site managed by OU Campus includes a DirectEdit link to allow content contributors to log in directly to edit a page.

Logging into OU Campus with DirectEdit

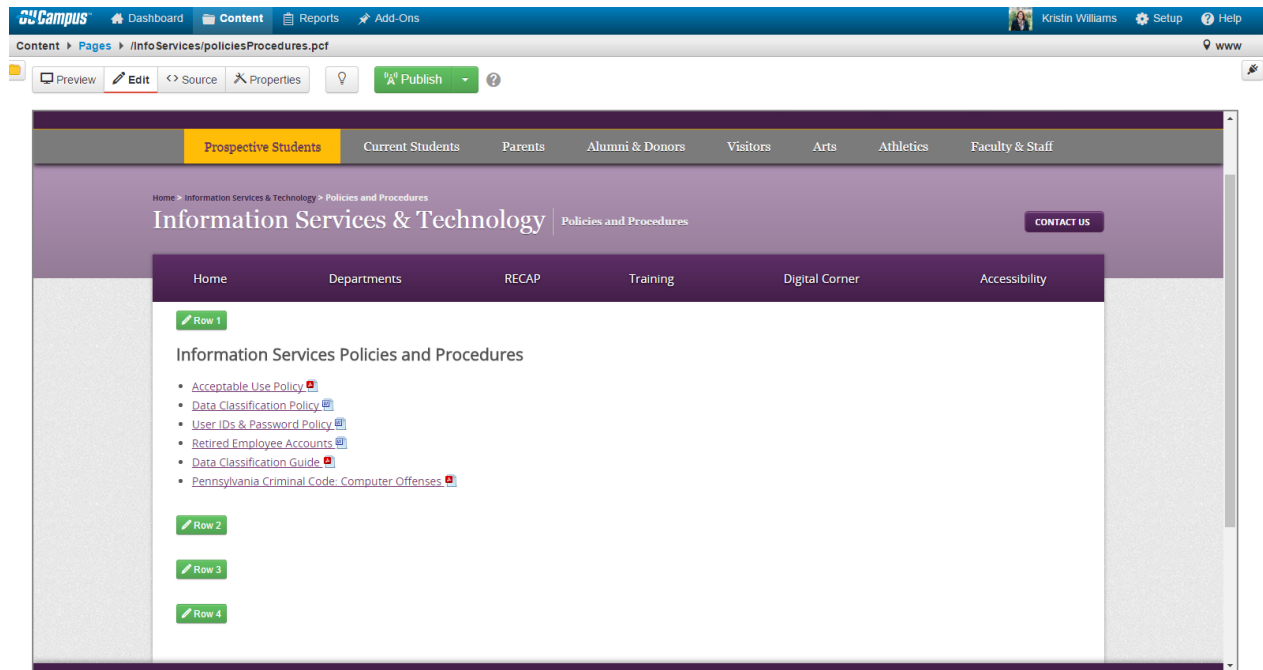
1. Navigate to the desired page on the “live” website
2. Click the **DirectEdit** link on the published page. On our pages, the DirectEdit link is in the footer and says “Last Updated: xx/xx/2016”, it will actually reflect whatever date the site was last updated.



3. You will then be taken to the OU Campus login page. Your login is the same as your wcupa.edu email login.

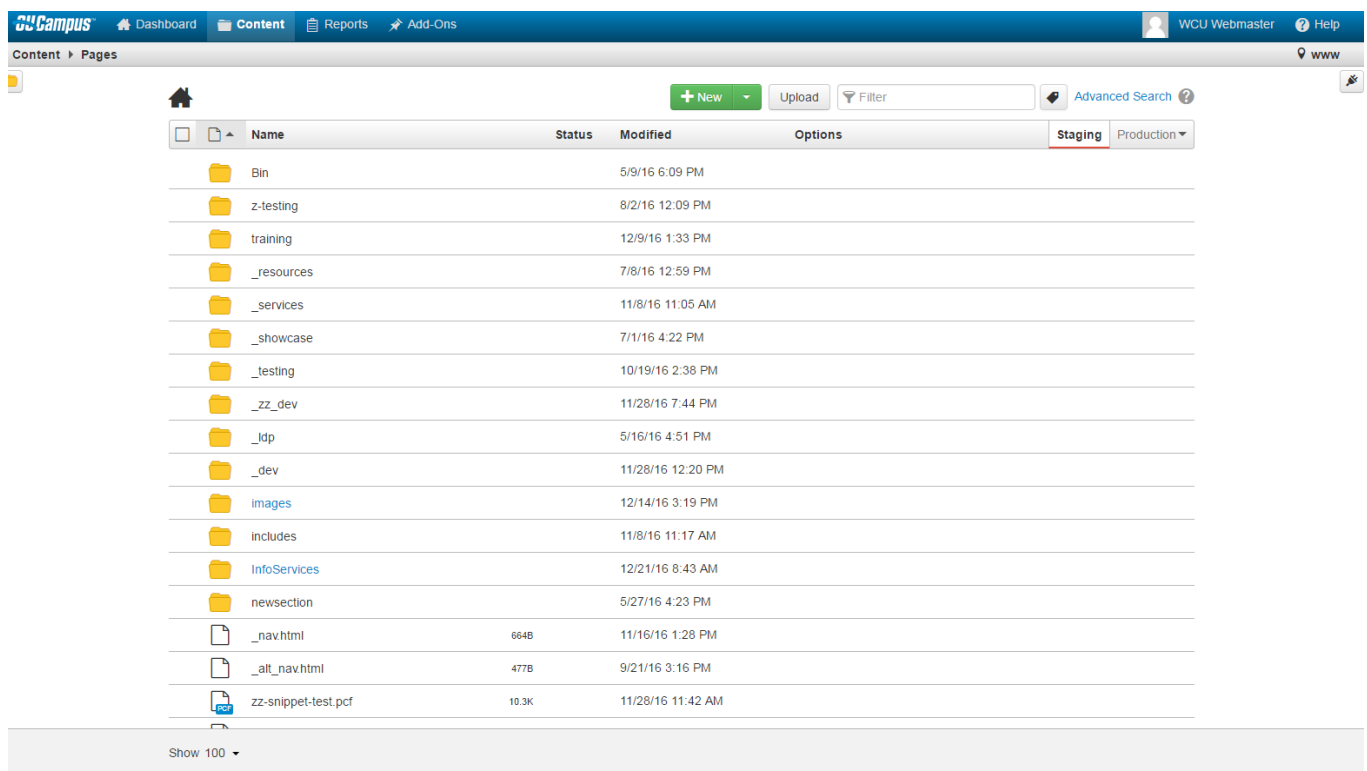


4. You will now be on the “Edit Mode” of the page that you were looking at on the live server.



Logging into OU Campus without a DirectEdit link

If you're logging in from a link that you created a bookmark from. Perhaps one that links right to your dashboard and doesn't take you to a specific page, you'll see a directory of folders, like in the image below. Notice that some of them are blacked out. This means you do not have permission to access those folders. Any folder name in blue, you have access to. Navigate to the appropriate folder and check out your page.



Pages are checked in and out by users when they are edited. To check out a page:

-  Preview
  Edit
  Properties
  Versions
 


 Submit
 


- faculty.pcf
- index.pcf
- news
- student_quotes.pcf**
- welcome

Overview

Editable Regions

Editing a Page via the JustEdit Toolbar

- [Main Content](#)

2. Make any necessary changes using the toolbar and click **Save and Exit**  when done.



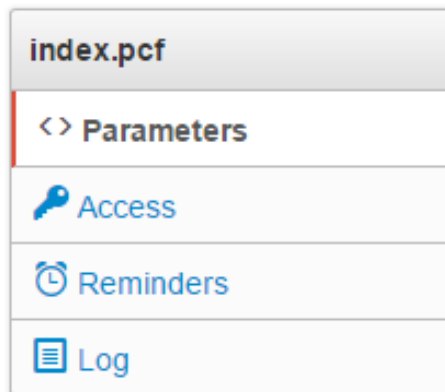
Toolbar Descriptions

(Starting from top left going right)

- | | | | |
|-----------------------|--------------------|--------------------|---------------------------|
| • Save & Exit | • Spell Check | • Superscript | • Help |
| • Exit without Saving | • Clear Formatting | • Subscript | • Styles |
| • Restore last draft | • Bold | • Align Left | • Insert/Edit Image |
| • Cut | • Italicize | • Align Center | • Horizontal Line |
| • Copy | • Bullet List | • Align Right | • Insert Snippet |
| • Paste | • Number List | • Justify | • Maximize Content Region |
| • Find and Replace | • Decrease Indent | • Insert/Edit Link | |
| • Undo | • Increase Indent | • Remove Link | |
| • Redo | • Block Quote | • Anchor | |

Editing Page Properties

The Page Properties screen is where metadata and custom settings for templates are stored. Users with access to Page Properties can edit Page Parameters, create Reminders, view the Log, add RSS items, and more. Page Parameters include adding a page description and page keywords for Search Engine Optimization. You can also add tags for within the OU system.



1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the Pages content's row and select Properties from the Edit menu.
2. Additionally, selecting Properties from the Page Actions toolbar will take users to the Properties view.
3. Make any necessary changes to Page Parameters and click **Save**.

Using Snippets

Snippets are the other main type of editable content in OU Campus. Snippets can be placed into any editable region inside OU Campus, and when inserted, the snippet code becomes part of the page's HTML.

Some of the snippets that we'll use will be inserting an accordion, or adding an image button that opens into a fancy box, or adding in the link to a youtube video.

To insert a snippet:

1. Select a page for editing and open the JustEdit Toolbar by editing an editable region.
2. In the JustEdit Toolbar, place the cursor where the snippet is to be inserted and click the **Insert Snippet** icon. Alternately, expand the Gadgets Sidebar and use the Snippets Gadget.



3. In the Choose Snippet modal, select a Category. Click **Insert** when the desired snippet has been selected. If you want to see what a snippet looks like before you choose it, head to our Snippet Style Guide, <http://wcupa.edu/training/styleGuide/default.aspx>

Choose Snippet

(All Categories)

(All Categories)

Hiding Content

General Content

Gallery Plugins

Layout

Shadow Effect

Announcements

Carousel Slider

Column (2) Layout

Column Layout

Content Slides

Email Link (mailto link)

Expanded List

Expanding Content

Fancy Box Image

Fancy Box Image + Content

Select a snippet to preview it here.

Cancel

Insert

- Once the Snippet is inserted on the page, edit the content as desired. Click **Save and Exit** to view the snippet on the page. **Note:** Certain snippets will display in a table format in the JustEdit editor to make it easier to format content within them, but will transform into another format in the Preview view and on the live site.

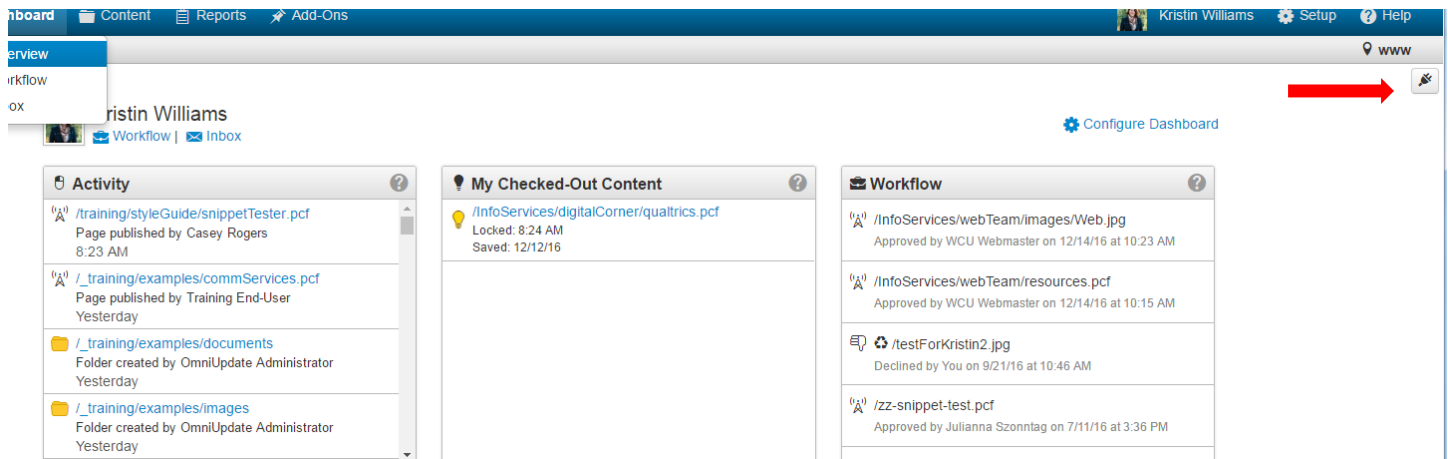
Accordion	
Creates an Accordion Style Content. Add more rows for content.	
Width of Content (Grid Value not to exceed 12)	<div>Please enter the grid number of how far the accordion will span, if you do not want a limiting span, please type the word `none`</div> <div>12</div>
Text You See on Dropdown Button	Dropdown Button Text (hidden unless clicked)
FAQs	<ul style="list-style-type: none"> Qualtrics FAQ What if I already have a Qualtrics account? You will need to log in to wcupa.qualtrics.com with your university username and password. When you attempt to log in the system will ask if you already have an account, click yes and then hit submit. This will then pull in your previously created surveys. Can I import my SurveyMonkey surveys into Qualtrics? No. This is not supported.
Training	<p>Qualtrics offers an extensive collection of online tutorials and documentation.</p> <ul style="list-style-type: none"> Learn Qualtrics in 5 steps Qualtrics University

Gadgets

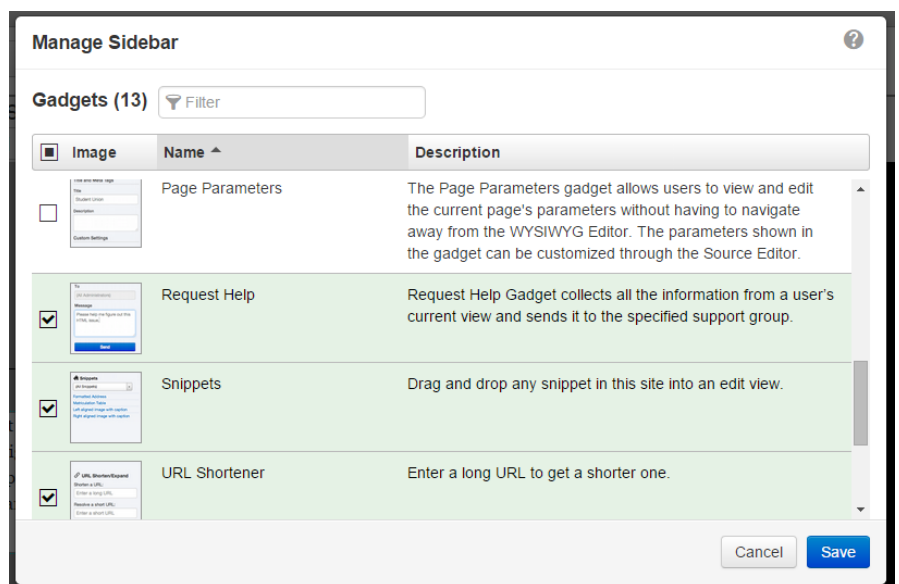
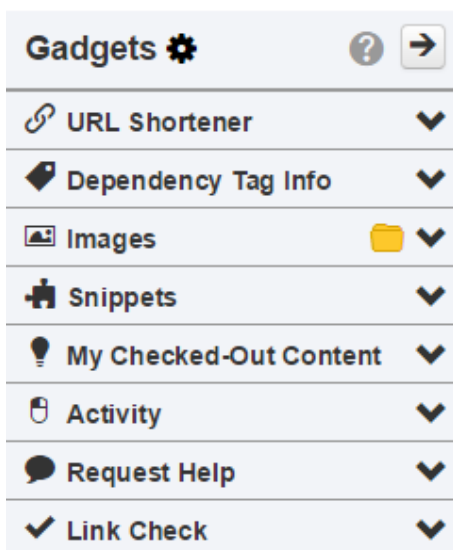
Gadgets are additional tools provided in OU Campus. Gadgets are available in both the Gadgets Sidebar and the Dashboard. Gadgets are context aware meaning that certain gadgets will be available in one location but not the other. Certain gadgets, like snippets and images, will also only be available in the JustEdit editor while users are editing content.

Sidebar Gadgets

1. From any view in OU Campus, select the **Show Gadgets** icon in the top right corner of the screen to expand the Gadgets sidebar.




2. To enable or disable specific gadgets, select the **Choose Gadgets** gear icon and click on any number of the available gadgets to enable or disable them. Enabled gadgets are highlighted in green. Click **Save** when done.



Dashboard Gadgets

1. Navigate to the Dashboard view by selecting **Dashboard** from the global navigation bar. Available Gadgets will show up in the main Dashboard screen.

 Kristin Williams
[Workflow](#) | [Inbox](#)

[Configure Dashboard](#)

Inbox

(Unknown User) 7/6/16
Request for help from zz-trainer
Message: I am unable to add an asset to my page Path:...

(Unknown User) 7/6/16
Request for help from zz-trainer
Message: I am unable to add an asset to my page Path:...

Eric Stettner 6/23/16
EStettner has exceeded their maximum number of I...
Dear OU Campus Administrator, Someone has attempte...

Kristin Williams 6/23/16
KWilliams has exceeded their maximum number of ...
Dear OU Campus Administrator, Someone has attempte...

Activity

LKeefe
User created by Kristin Williams
7/8/16

LGriffin
User created by Kristin Williams
7/8/16

JWatts
User created by Kristin Williams
7/8/16

PGargiulo
User created by Kristin Williams
7/8/16

My Checked-Out Content

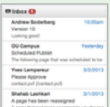
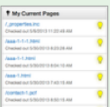


/middle.pcf
Locked: 9:18 AM
Saved: 5/16/16

/bottom.pcf
Locked: 9:18 AM
Saved: 9:04 AM

2. To enable or disable gadgets, click the **Configure Dashboard** link, and click on any number of the available gadgets to enable or disable them. Enabled gadgets are highlighted green. Click **Save** when done.

Dashboard Configuration

Gadgets (5)

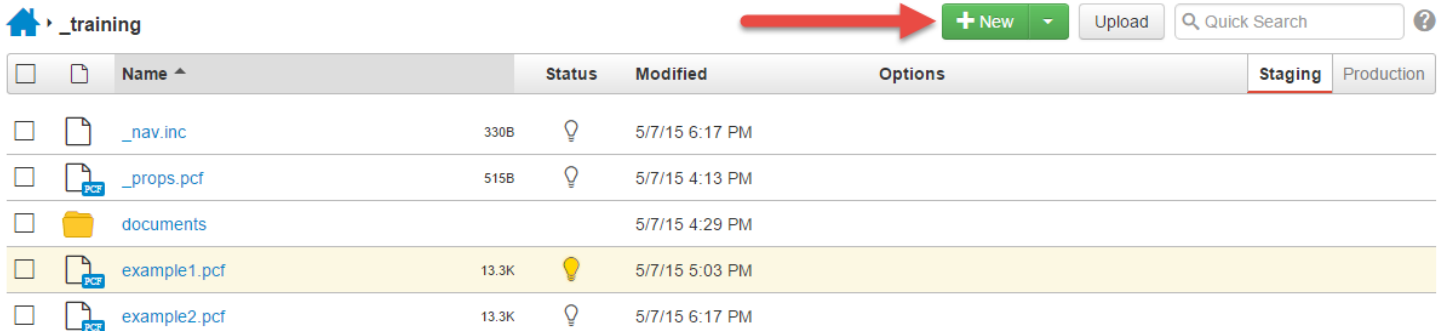
<input type="checkbox"/>	Image	Name ^	Description
<input checked="" type="checkbox"/>		Inbox	Lists your most recent Inbox messages, with brief excerpts.
<input checked="" type="checkbox"/>		My Checked-Out Content	Lists all your checked-out files. Click one to go straight to its editing preview.
<input type="checkbox"/>		Site Analytics	Displays graphs of analytics data about this site.
<input type="checkbox"/>		Workflow	The Workflow gadget is a dashboard and sidebar gadget that shows all items in a user's workflow, from items sent to another user for approval to items awaiting the current user's

[Cancel](#) [Save](#)

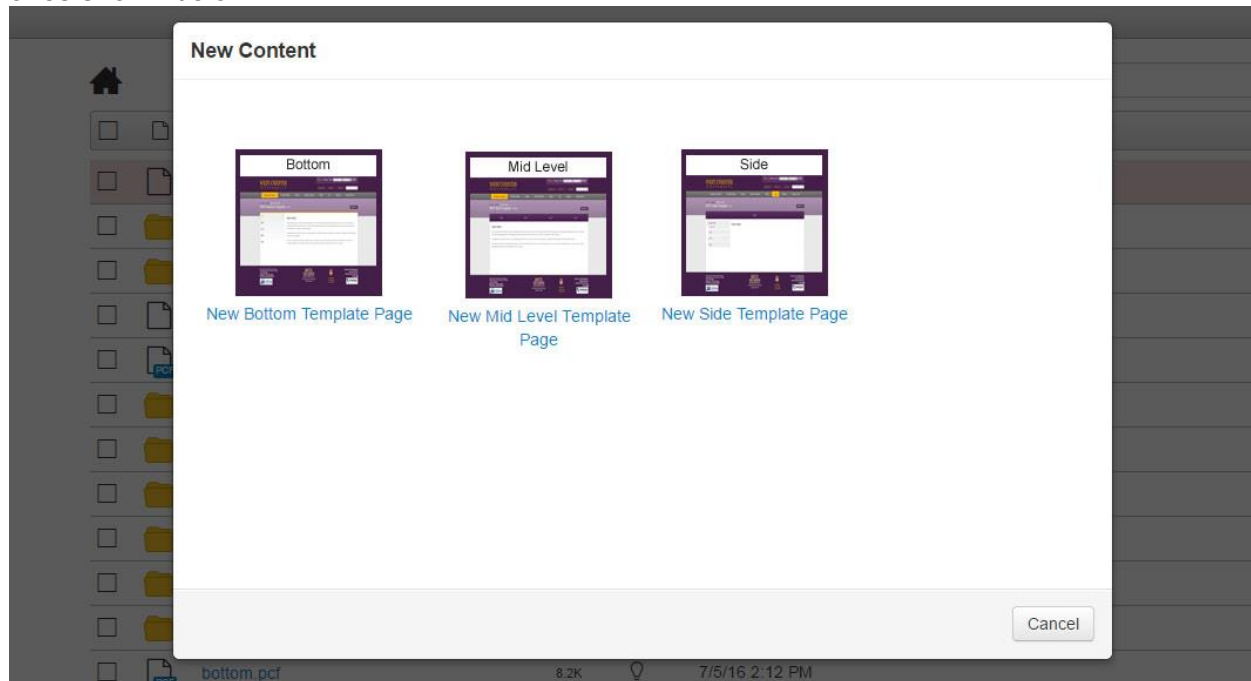
Creating Content

Creating a New Page

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar.
2. Click New.



3. From the New Content modal, select an available template by clicking on the corresponding thumbnail icon. Depending on your location inside the file structure, different templates may be available than the ones shown below.



4. In the Interior Page form, fill out or modify all fields displayed and click Create. This will create an entirely new page on the staging server in OU Campus, which can then be edited and published to add new web pages to the live site.

Interior Page

General Page Setup

Page Title
Required Field. Enter the page title. This will also be displayed by search engines as well as the web browser window.

Description
Important. Enter a short description of the page, to be displayed by search engines.

File Configuration

Add Navigation Item
Specify if this page should be added to the navigation file automatically. Note that both files need to be published after creation.

Filename
Enter a filename using only lowercase letters, underscores, or dashes

Page Options

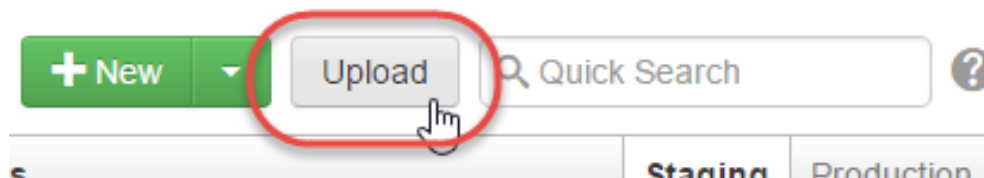
Overwrite Existing ☐
If selected, this file will overwrite any existing file of the same name in the same location.

Access Group
Specify the group with rights to edit this file.

Uploading Content

Uploading a File from the Pages List View

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar.
2. Navigate to the directory in which the content will be uploaded and click **Upload** to open the Upload modal.



3. Select one of the radio buttons in the Upload Type parameter to define what type of upload is being executed.

- Click **Add** 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.
- Click Start Upload.

Upload to /images

Type ☒ Upload Files ☐ Edit and Upload Image ☐ Import Zip File

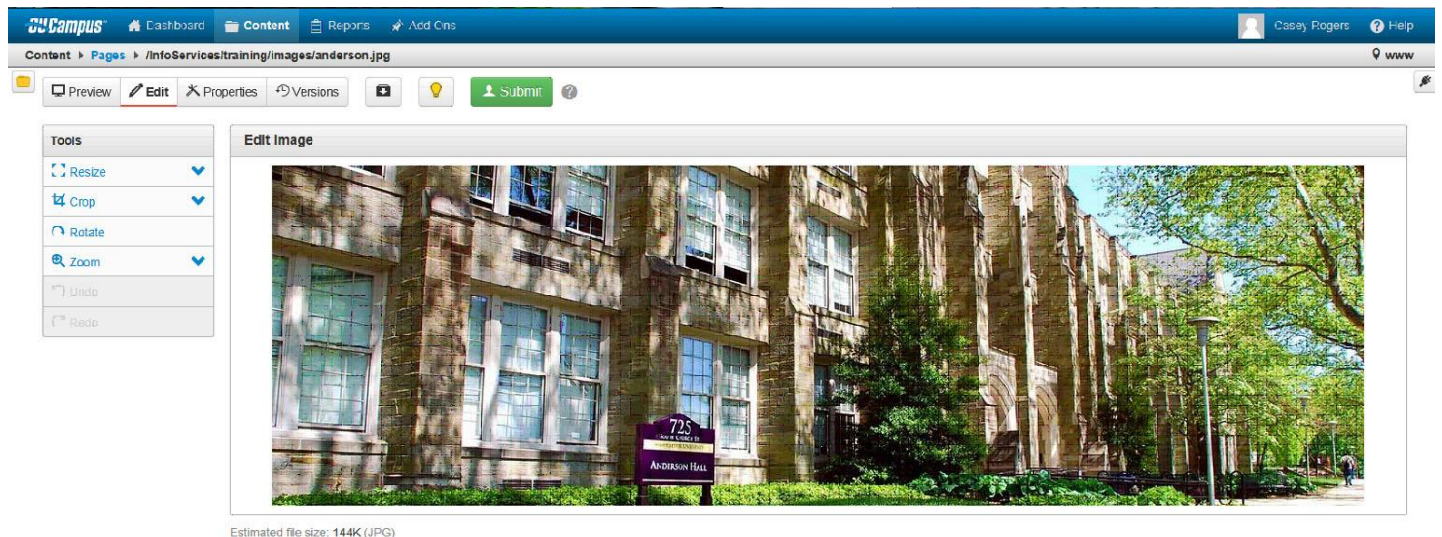
Access Group (Inherit Existing) ▼

Overwrite Existing ☐

Files + Add or drag files from desktop

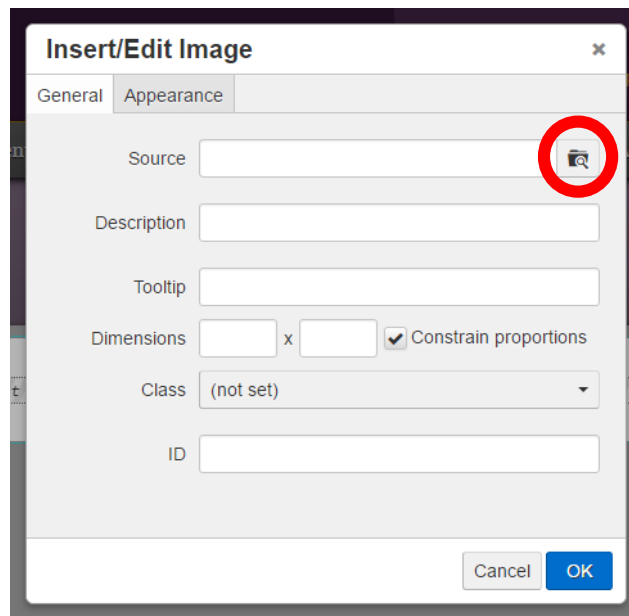
Cancel Start Upload

Note: When uploading an image, it will be submitted for approval before you are able to use it on your pages. After you've uploaded an image and see the following screen, please check in the images by clicking on the lightbulb. Once you see the below screen, click on the 'Submit' button. This submits your image for approval. Please make sure to keep "Send copy to e-mail" checked. That will send an e-mail directly to the webmaster.

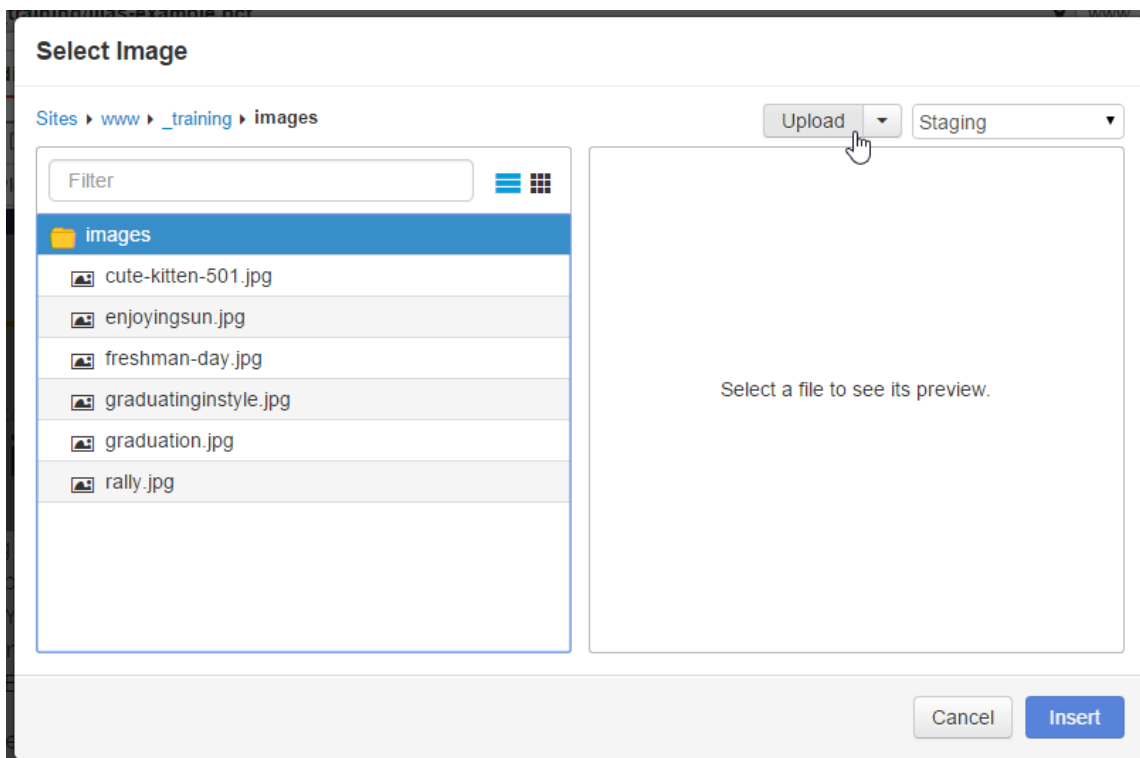



Uploading a File from the JustEdit Toolbar

1. Navigate to a page and enter an editable region to access the JustEdit Toolbar.
2. Click **Insert/Edit Link** to upload a document while creating a link. If inserting an image, click **Insert/Edit Image** to upload an image and place it on the page at the same time.
3. Click the **Browse** icon to open the file chooser.



4. Click **Upload**, found in the top right of the modal.

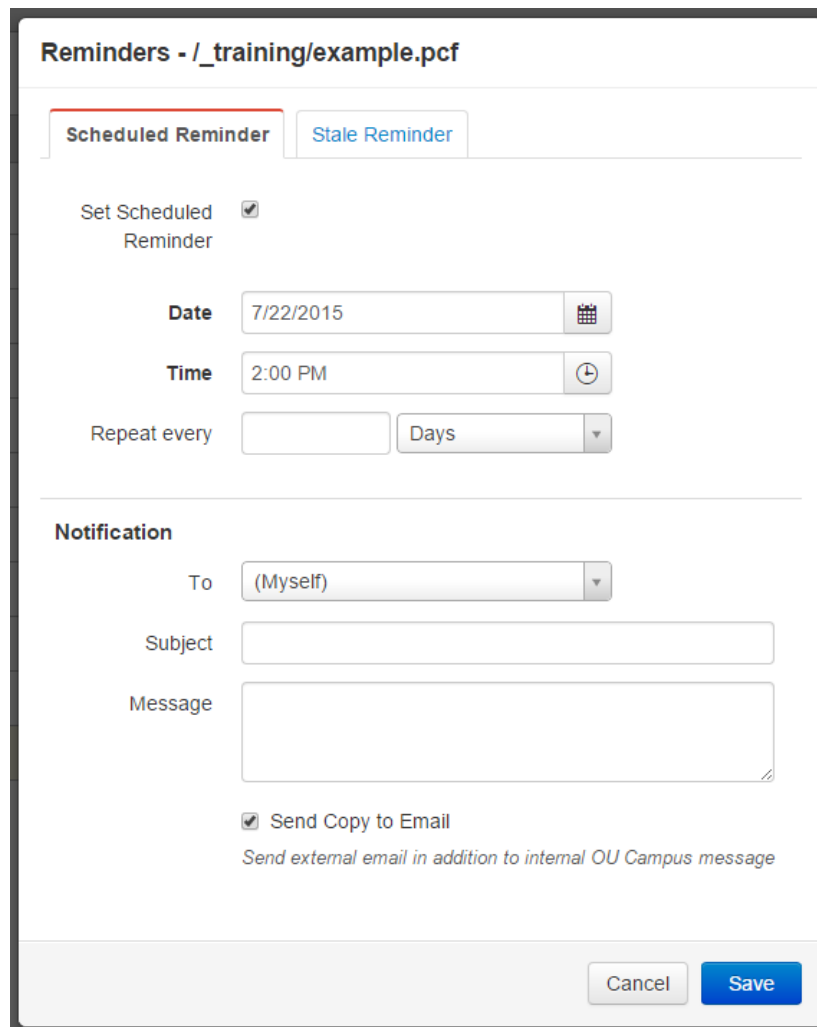


5. Click  to open the file browser, or drag and drop the files directly into the Upload modal from any external source including the user's desktop.
6. Click **Start Upload**. The documents, images, etc. will be uploaded into the folder shown in the file chooser modal. This file can now be inserted into or linked on the page.

Setting Reminders

Schedule a Reminder

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the pages content's row and select **Reminders** from the Edit menu. This option is also available in the Reminders section of Page Properties.
2. In the Reminders modal, select the checkbox on the tab labeled **Scheduled Reminder**. Select a Stale Reminder if that option is preferred. A scheduled reminder will trigger on a specific date and time. A Stale reminder will only trigger if the page has not been edited within a specific time period. For both reminders, the time periods are custom.
3. Fill out all necessary fields including the Date and Time. Optionally, select the checkbox labeled **Send Copy to Email** to send an external email to the designated email address.
4. Click Save.



The screenshot shows a modal window titled "Reminders - /_training/example.pcf". It has two tabs: "Scheduled Reminder" (active) and "Stale Reminder". Under the "Scheduled Reminder" tab, there is a checkbox "Set Scheduled Reminder" which is checked. Below this are input fields for "Date" (7/22/2015) and "Time" (2:00 PM), each with a calendar and clock icon respectively. There is also a "Repeat every" field with a "Days" dropdown. The "Notification" section includes a "To" dropdown (Myself), a "Subject" text field, and a "Message" text area. At the bottom of the notification section is a checked checkbox "Send Copy to Email" with the text "Send external email in addition to internal OU Campus message". At the very bottom of the modal are "Cancel" and "Save" buttons.

Setting a Stale Reminder

Stale reminders are used to remind users when a page has not been published after a certain amount of time. The stale reminder will send a notification to you (or another user) when the predetermined amount of time has been reached and the page has not been published.

To set a Stale Reminder:

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the pages content's row and select **Reminders** from the Edit menu. This option is also available in the Reminders section of Page Properties.
2. In the Reminders modal, select the checkbox on the tab labeled **Stale Reminder**. The stale reminder will trigger after a certain amount of time has passed since the page was last published.
3. Set the amount of time needed to trigger the stale reminder and fill out the Notification fields as well. Optionally, select the checkbox labeled **Send Copy to Email** to send an external email to the designated email address.
4. Click Save.

Reminders - /_training/example.pcf

Scheduled Reminder **Stale Reminder**

Set Stale Reminder ☒

Last Published 6/24/2015 3:48 PM

Stale After

Notification

To

Subject

Message

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

Versions

Comparing Versions

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Check out the page and hover over the page's row and select **Versions** from the Review menu. Additionally, click on the content's hyperlinked name and select **Versions** from the Page Actions toolbar.

Properties Versions ✓ 📄 💡 Publish ?

Versions (6)

Compare to Live

Version	Date	User	Description	Options
6	7/14/15 11:14 AM	zz-omniupdate	Adding custom breadcrumb option	
5(Live)	6/30/15 1:46 PM	Trainer Admin		Live on publish target: www
4	6/30/15 1:35 PM	Trainer Admin	WYSIWYG for training replace	
3	6/29/15 10:51 AM	Katie Rose		
2	6/29/15 10:49 AM	Katie Rose		
1	6/29/15 9:03 AM	Trainer Admin		

2. In the Versions view, hover over the target version's row and select Compare. Additionally, the file can be compared to the newest version on the production server by clicking **Compare to Live** and selecting a target site from the corresponding drop-down menu.

Reverting to a Previous Version

1. In the Versions view, hover over the version's row and select **Revert**. This will revert the page on staging to the selected version. The page must be published before the change is reflected on the live site.

Versions (6)

Compare to Live

Version	Date	User	Description	Options
6	7/14/15 11:14 AM	zz-omniupdate	Adding custom breadcrumb option	
5(Live)	6/30/15 1:46 PM	Trainer Admin		Live on publish target: www
4	6/30/15 1:35 PM	Trainer Admin	WYSIWYG for training replace	
3	6/29/15 10:51 AM	Katie Rose		🔍 View 📄 Compare ↶ Revert
2	6/29/15 10:49 AM	Katie Rose		
1	6/29/15 9:03 AM	Trainer Admin		

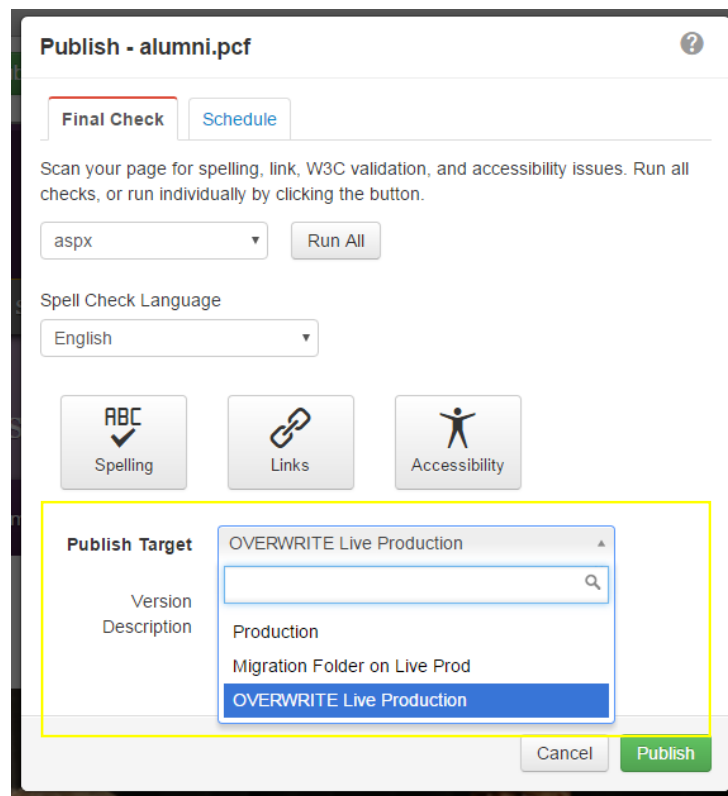
Publishing Content

Publish Now

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Additionally, expanding the File Navigation sidebar will also display a list view of all pages.
2. Hover over the target content's row and select **Publish** from the Publish menu. Additionally, clicking Edit in the Edit menu will open a view containing the Page Actions toolbar. From here the user can also click Publish.



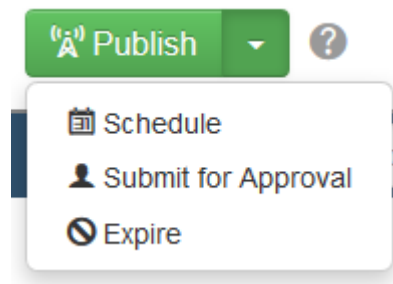
3. If the Final Check or Page Check modal appears, optionally run any of the available tests and click Publish Now.
- **PLEASE REMEMBER: On Publish Target you must choose OVERWRITE Live Production to publish to the live server!**



Schedule a Publish

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the page content's row and select **Schedule** from the Publish menu.
2. Additionally, this action is available from the Page Actions toolbar. From here the user can also

click Schedule, which is an option in the drop-down menu attached to the Publish button. The Schedule modal will open.



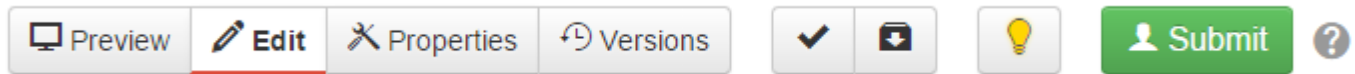
- From the Schedule modal, select a **Date** and **Time** that the content will be published on. Optionally, users can repeat publish by inputting a number in the available text field, and selecting a measurement of time from the corresponding drop down menu.

A screenshot of the 'Publish - index.pcf' modal window. It has three tabs: 'Final Check', 'Schedule' (which is active), and 'Social Media'. The 'Date' field shows '5/7/2015' with a calendar icon to its right. A red arrow points to this icon. A calendar for 'May 2015' is open, showing the 7th as selected. The 'Time' field has a clock icon. The 'Repeat every' field has a dropdown menu. Below these are 'Notification' fields for 'Subject' and 'Message'. At the bottom, there is a checkbox for 'Send Copy to Email' and a note 'Send external email in addition to internal OU Campus message'. At the very bottom are 'Cancel' and 'Schedule' buttons.

Submit for Approval

- Users in a workflow will only have the option to submit pages for Approval before they are published. To submit a page, navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the page content's row and select Submit from the Publish menu.

2. Additionally, this option can be selected from the Page Actions toolbar. From here the user can also click Submit.



3. The Submit modal will open with an approver selected in the **To** drop down menu. Enter a text in the Subject and Message fields then hit submit. This will send the current page to the designated approver. **Note:** The page will be locked to the approver until changes are either declined or published.

Submit for Approval - accessibility.pcf

When submitting for approval, the message is automatically set as public for current and future workflow participants.

To WCU Webmaster (Webmaster@wcupa.e...)

Subject
Required field

Message

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

Cancel Submit

Approve and Publish or Decline Content from Other Users

1. Navigate to the Workflow view by selecting **Dashboard > Workflow**.
2. Hover over the page awaiting approval and select **View**.

Workflow (5)

<input type="checkbox"/>	From	Approver	File	Status	Date / Options
<input type="checkbox"/>	Training End-User	Training End-User	/_training/untitled.pcf		View Delete
<input type="checkbox"/>	Training End-User	Brandon Scheirman	/_training/example2.pcf		5/8/15 9:35 AM
<input type="checkbox"/>	Training End-User	Training End-User	/_training/example1.pcf		5/8/15 9:34 AM
<input type="checkbox"/>	Brandon Scheirman	Training End-User	/_training/index.pcf		5/8/15 9:33 AM
<input type="checkbox"/>	Brandon Scheirman	Brandon Scheirman	/_training/example1.pcf		5/8/15 9:33 AM

Display rows per page

3. Review the content, and if the content meets the requirements to be published, click **Publish**. If the content does not meet the requirements to be published, click **Decline**.

Preview Edit Source Properties Versions

Publish

Decline

4. Fill out all necessary fields in the Decline or Publish modal. Click Publish or Decline to complete the action.

Publish - example2.pcf

Final CheckScheduleSocial MediaApproval

Notify Submitter ☒

Optionally notify the user who submitted this file for approval.

Subject

Approved for Publish

Message

The following page in site "www" has been approved and published:

/_training/example2.pcf

☒ Send Copy to Email

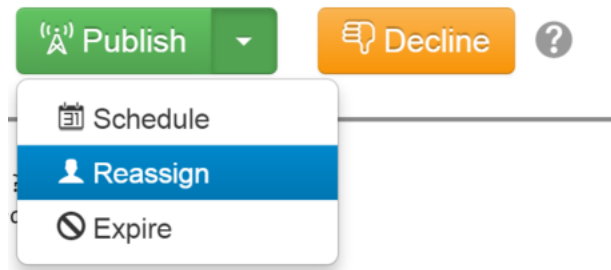
Send external email in addition to internal OU Campus message

Cancel

Publish

Reassigning Approval of Content from Users

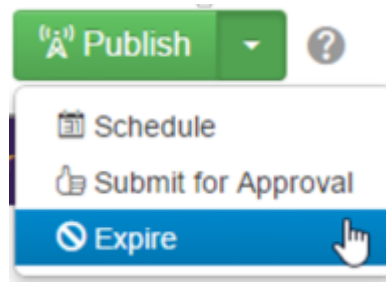
1. Navigate to the Workflow view by selecting **Dashboard > Workflow**. Hover over the page awaiting approval and select **View**.
2. Click the drop- down arrow on the Publish button and select **Reassign**.



3. Select a user to send the file to from the drop-down menu labeled **To**.
4. Fill out all necessary fields and click **Submit**.

Schedule an Expiration

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Additionally, expanding the File Navigation sidebar will also display a list view of all pages. Hover over the pages content's row and select **Expire** from the Publish menu.
2. Additionally, this option is available from the Page Actions toolbar. From here the user can also click **Expire**, which is an option in the drop-down menu attached to the Publish button. The Schedule Expiration modal will open.



3. From the Schedule Expiration modal, choose an Expire Type (either replace content on the page with content from another page or recycle the page).
4. Select a Date and Time for the file to expire.

Click **Schedule** when finished.

Why would you need to schedule an expiration? If you have a timely event or information such as a registration page etc...

Page Check

Page Check is used to run a series of checks on a page before it is published. Page Check can be run from the Page Actions toolbar, or it can be configured to be run when you click the **Publish** button (this is called Final Check). There are four checks available: Spell Check, Link Check, Accessibility Check, and W3C Validation. To run Page Check:

1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the pages row and select **Page Check** from the Review menu.

2. Additionally, selecting Page Check from the Page Actions toolbar will take users to the Page Check modal.



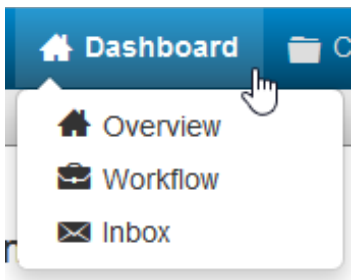
3. Click on one of the tests (Spelling, Links, W3C Valid, and Accessibility) to run them individually, or select Run All to run all available tests.

A modal dialog titled 'Publish - bottom.pcf' with a question mark icon in the top right corner. It has two tabs: 'Final Check' (selected) and 'Schedule'. Below the tabs, text reads: 'Scan your page for spelling, link, W3C validation, and accessibility issues. Run all checks, or run individually by clicking the button.' There is a dropdown menu showing 'aspx' and a 'Run All' button. Below that, 'Spell Check Language' is set to 'English' in a dropdown. Three buttons are shown: 'Spelling' (with an ABC icon and checkmark), 'Links' (with a chain link icon), and 'Accessibility' (with a person icon). At the bottom, there is a 'Version Description' label and a text input field. A blue '0/256' character count is at the bottom right of the input field. At the very bottom of the modal are 'Cancel' and 'Publish' buttons.

4. Review results and click **Done** when finished. You may get some errors when doing the page check but make sure that spelling is checked!

Dashboard

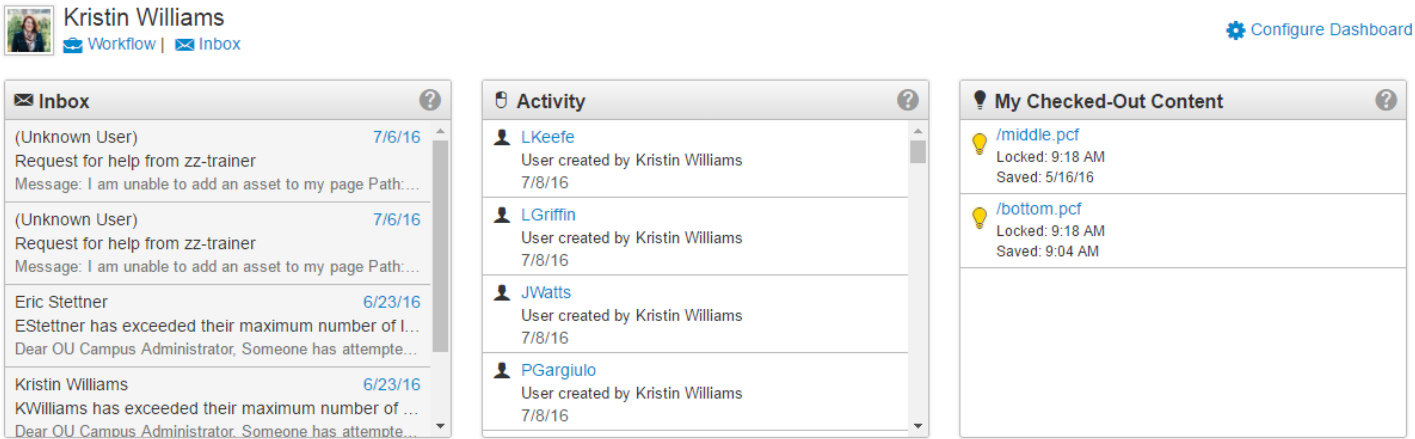
The OU Campus Dashboard provides a location within the CMS where each individual user can access user-specific messaging and gadgets. The Dashboard is the default log-in location from the standard OU Campus Login screen when not utilizing DirectEdit.



In the Dashboard menu on the global navigation bar, users can find links to Workflow and Inbox. These options are also found beneath the user's name on the Dashboard overview page.

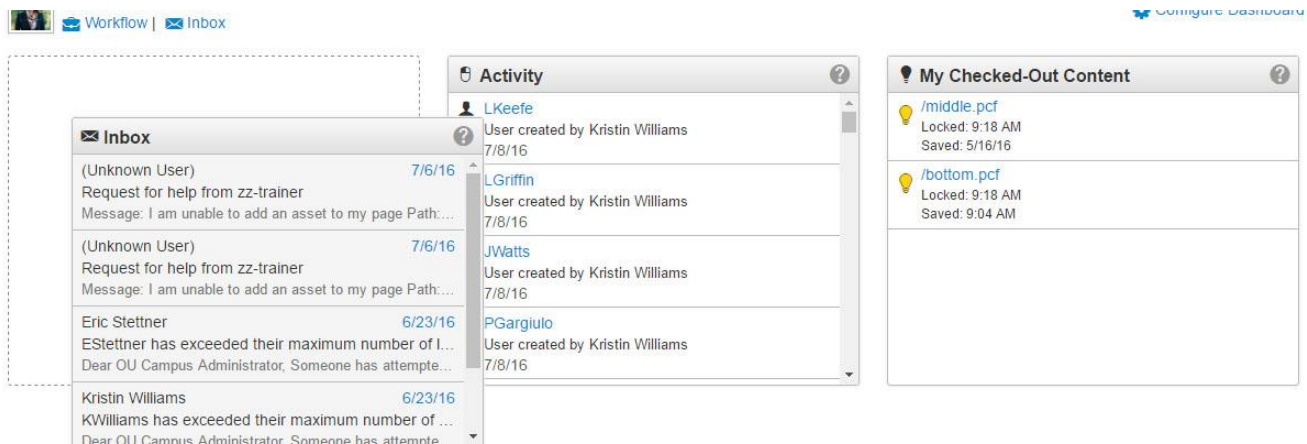


The Dashboard can be customized by each individual user by choosing which gadgets to show or hide in the view. A level 10 administrator can add gadgets to the system, and then make them available using group access controls



Dragging Dashboard Gadgets

Gadgets can also be reordered on the Dashboard by clicking and dragging the grey title bar to a new "tile," shown by a dotted line.



There are three options on the Dashboard menu in the global navigation bar:

Overview

Clicking Overview takes users to the Dashboard overview page (see above). Simply clicking the Dashboard link in the Global Navigation bar will take users to the same location.

Workflow

The Workflow list view shows content that a user has sent to another user for approval or content that has been sent to the current user for approval. These messages are separate from other messages (which can be viewed in Inbox and Sent). Content moving through an approval process can be tracked using this screen.

Inbox

Inbox displays messages from other users as well as automated messages associated with scheduled actions, such as a notification of scheduled publish or notification of page expiration. The Inbox Gadget is also shown on the Dashboard and includes how many new messages are in the inbox. The Inbox includes a linked list of messages and the functionality to compose a message.

The available features and functionality of the Dashboard are as follows:

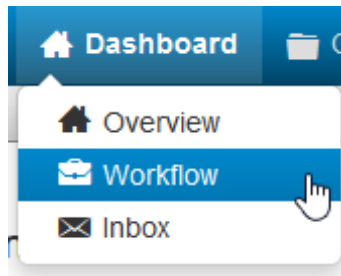
- **Workflow:** The Workflow list view shows content that a user has been sent for approval or content that a user has sent for approval and are separate from other messages, which can be viewed in the Inbox and Sent. Content within an approvals process can be tracked using this screen.
- **Inbox:** Inbox displays messages from other users as well as automated messages associated with scheduled actions, such as a notification of scheduled publish or notification of page expiration. The Inbox includes a linked list of messages and the functionality to compose a message.
- **Configure Dashboard:** Once specific Dashboard gadgets have been configured to be available for a group of users, members of the group can choose which gadgets to show on the main content area. The Configure Dashboard feature can be used by each individual user to choose which gadgets to show in the main content area.

Frequently displayed gadgets include an activity feed of recent site activity, the system inbox for messaging and notifications, a list of pages that are currently checked out by the user, and site analytics. Dashboard gadget can be reordered by clicking the gray title bar and dragging to the new location.

Workflow

Overview

Workflow is a component of the Mailbox that allows users to track content that has been sent for review through the approval process. The Workflow list view shows content that the current user has submitted to another user or received from another user. Additionally, content that has passed through or completed a workflow process (such as when content was approved and published, the request was declined, or canceled) is also shown in this view.



Workflow can be found in the global navigation bar at **Dashboard > Workflow** or by clicking the Workflow link near your name on the Dashboard page.

When an administrator configures access settings for a page, users editing the page may be required to submit their changes to an approver in order for the content to be published. When this is the case, the **Publish** button on the page will be replaced with the **Submit** button. Users can include a message to the approver along with the submission. These messages, along with a link to the content, appear in the approver's Workflow list view.

General messages unrelated to approvals that are sent to the user's account will not be found on the Approval page. They are available in the Inbox.

Level 9 and Level 10 administrators may view the Pending Approvals report to view all content in workflow across all users.

Workflow (5)

<input type="checkbox"/>	From	Approver	File	Status	Date / Options
<input type="checkbox"/>	Training End-User	Training End-User	/_training/untitled.pcf		View Delete
<input type="checkbox"/>	Training End-User	Brandon Scheirman	/_training/example2.pcf		5/8/15 9:35 AM
<input type="checkbox"/>	Training End-User	Training End-User	/_training/example1.pcf		5/8/15 9:34 AM
<input type="checkbox"/>	Brandon Scheirman	Training End-User	/_training/index.pcf		5/8/15 9:33 AM
<input type="checkbox"/>	Brandon Scheirman	Brandon Scheirman	/_training/example1.pcf		5/8/15 9:33 AM






Display rows per page

The Workflow screen includes the following features and functionality:

- The number of items in the Workflow
- Filter tool to narrow down visible results in the list view
- Selection checkboxes to select and delete multiple messages at a time, or to view a single workflow message
- Sortable columns in the list view. Messages can be sorted by From, Approver, File, Status, or Date
- The linked file name which can be clicked to preview the content
- Status icons indicated where the page is in the workflow process
- The date and time that the content was sent for approval

Status in Workflow

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 a status icon 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

Viewing a Workflow Message

When content is sent for approval, the sender can attach a message. This is associated with the item in Workflow as a Workflow Message, which can be viewed by performing one of the following actions:

- Hovering over the file row and clicking on the View option
- Clicking the Status icon
- Selecting the checkbox next to the item and clicking

View From within the message, users can:

- Click the linked file to preview the content sent for approval
- View the workflow details, including the site from which the content originated, the status, the date of the latest action indicated by status (e.g., if the content has only been sent for approval but not approved, this shows the sent date, once published this shows the publish date), and who sent the content and the approver. This also shows the message's details: i.e., the date and time the message was sent, the subject, and the message (if any).
- Delete the message
- Reply to the message
- Navigate back to Workflow

Mailbox

Workflow

Workflow Message

Inbox

Sent

Workflow Message

File

Site

Status

Action Date

From

Approver

Date

Subject

Message

/_training/example1.pcf

www

Pending Your Approval

N/A

Brandon Scheirman

Training End-User

5/8/15 12:50 PM

Approve this page please!

I've added new tuition rates for 2015-16.

Reply

Back to Workflow

Replying to a Workflow Message

Users can reply to workflow messages by clicking the **Reply** button in the message. The Reply modal is shown. Additional users or groups can be added to the message, the subject can be changed, and a message can be added. Optionally, a copy of the message can be sent by email in addition to the internal OU Campus message.

Reply

To

Training End-User (zz-enduser)

Subject

Re: Declined for Publish

Message

From: Training End-User

Date: N/A

Subject: Declined for Publish

The following page in site "www" has been declined for publish and requires additional changes:

☒ Send a copy by email

Send external email in addition to internal OU Campus message

Cancel

Send

Clicking **Send** will send the message to the designated users and/or groups and will return you to the original Workflow message. Clicking **Cancel** returns the user to the original Workflow message without sending a reply.

Inbox


Overview


OU Campus has an internal messaging system that allows users to send messages to other users and groups of users. These messages can be attached to requests for approval as part of the Workflow process, or they can be sent to users without associating them with a page. All messages can have a copy sent to a user's email address in addition to being sent internally in OU Campus.


All workflow-related messages reside in the Workflow section of the Mailbox. All other messages reside in the Inbox section, with the ability to compose, reply, forward, and delete messages, as well as view sent messages in the Sent section.

Inbox

Mailbox

 Workflow

 Inbox

 Sent

Inbox (2)

Filter

Compose

?

<input type="checkbox"/>	From	Subject	Date / Options ▾
<input type="checkbox"/>	Training End-User	Hello!	5/8/15 12:56 PM
<input type="checkbox"/>	Training End-User	zz-enduser has exceeded their maximum number of login attempts.	5/8/15 12:50 PM

Display


100

 rows per page

The Inbox is similar to a standard email inbox. Users can navigate to the Inbox from the Dashboard menu in the Global Navigation bar or by clicking the link to the Inbox on the Dashboard itself.

Inbox messages can also be previewed from the Dashboard through the Inbox Gadget. Clicking a message in the gadget will take users to the message in the normal Inbox interface.

Example of Inbox Gadget in Dashboard

 **Inbox** 2

Steve Smith

1:25 PM

Could you check a page in?

Hi Brandon, Can you check in the /student-

Brandon Scheirman

1:00 PM

Scheduled Page Reminder

This is the scheduled reminder for page, /admissio

Mary Cassidy

12:31 PM

Reminder

Don't forget to put the updated tuition rates

zz-omni

11/5/2014

test

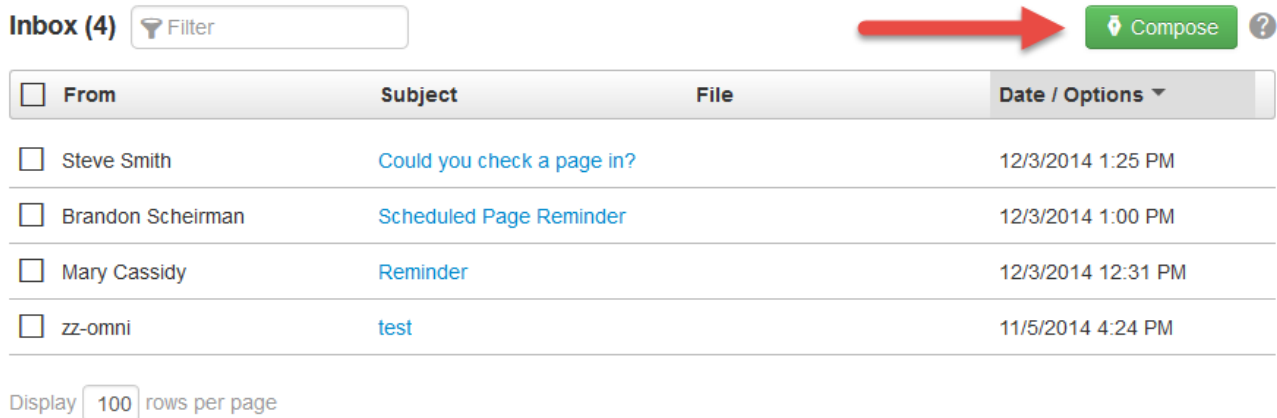
test message

Composing Messages

Compose is found in the Inbox and in the Sent box. By default, the Send a Copy by Email checkbox is selected. This will send an email with the composed message to the recipient's external email account, as long as the user receiving the message has an email address on file. If no email address is on file, it will only send the message within OU Campus.

To compose a message:

1. Navigate to the Inbox or Sent box.
2. Click on the Compose button, found in the top right of either screen.



3. A modal will appear. Enter the user to whom the message should be sent in the To field. A user or a group of users may be selected from the drop-down, which appears when the user clicks into the field.
4. Enter a Subject And Message
5. By default, the Send a copy by email checkbox is selected. To only send the message within OU Campus, uncheck this checkbox.
6. When the message is complete, click Send.

Viewing, Replying to, and Deleting Messages

To view a message on the Inbox screen, hover over the message row and click View, or click the hyperlinked message subject. From the gadget, click anywhere on the desired message to enter the message view in the Inbox screen.

Use the blue Reply button to reply to the message, or use the drop-down indicator next to the Reply button to forward the message to another user. A user can return to the Inbox without responding to or deleting the message by clicking the Back to Inbox button or the Inbox button in the local navigation bar on the left.

Mailbox

Workflow

Inbox

Inbox Message

Sent

Inbox Message

From

Steve Smith

Date

7/8/15 3:07 PM

Subject

Could you check a page in?

Message

Hi Brandon,

can you check in the /student-quotes.pcf page in for me so I can add a new quote?

Thanks,

Steve

Back to Inbox

Forward

Reply

A message may be deleted by hovering over the message row in the Inbox list view and clicking Delete. Multiple messages may be deleted by selecting the checkbox next to each message and clicking the Delete icon that appears in the top row.

Inbox (4)

Filter

Compose

2 Messages

Delete

<input type="checkbox"/>	Steve Smith	Could you check a page in?	12/3/2014 1:25 PM
<input checked="" type="checkbox"/>	Brandon Scheirman	Scheduled Page Reminder	12/3/2014 1:00 PM
<input type="checkbox"/>	Mary Cassidy	Reminder	12/3/2014 12:31 PM
<input checked="" type="checkbox"/>	zz-omni	test	11/5/2014 4:24 PM

Display
100
rows per page

Sent

The Sent list view shows messages that the user has sent and messages that were sent in association with scheduled publishes, reminders, and the workflow process. If a message that has been sent to the user is replied to or forwarded, then that is also shown on the Sent screen.

Mailbox

Workflow

Inbox

Sent

Sent (3)

Filter

Compose

<input type="checkbox"/>	To	Subject	Date / Options
<input type="checkbox"/>	Brandon Scheirman	OU Campus Publish Notification	6/29/15 4:30 AM
<input type="checkbox"/>	Brandon Scheirman	Publish Results	6/22/15 4:12 PM
<input type="checkbox"/>	Brandon Scheirman	Re: Please approve this page	5/28/15 4:38 PM

Other functionality available from the Sent screen includes:

- A list of the number of sent messages
- A filter tool to narrow results by the recipient or the subject
- A Compose button to immediately compose a new message
- Columns that are sortable by recipient, subject, or date
- Multi-select checkboxes to delete multiple messages at one time
- The ability to review, reply, forward, and delete messages from the Sent view
- Items that can be hovered over in the list view, allowing users to view or delete individual messages

Forwarding a Message

Users can forward previously sent messages to other users and groups.

Sent Message

To Brandon Scheirman
Date 5/28/15 4:38 PM

Subject Re: Please approve this page
Message I will check it out.

From: Brandon Scheirman
Date: N/A
Subject: Please approve this page

Added new information about Transfer Student Orientation.

Back to Sent

Forward

To forward a message:

1. From the **Sent** screen, click the **Subject** column of the desired message. Alternatively, hover over the message and click **View**.
2. Click **Forward** in the top right and fill in the **To** field with the desired recipients. Modify the **Subject** and **Message** fields as necessary.
3. By default, a copy will be sent via external email. If the user does not have an external email associated with their account, then the message is only sent within the CMS.
4. Click **Send**.