OmniUpdate®
Empower Web Excellence

End-User Reference Guide

El Camino College

OU Campus Version 10

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About OmniUpdate, Inc.

OmniUpdate is the leading web content management system (CMS) provider for higher education. The company focuses on providing an exceptional product and customer experience to its OU Campus™ CMS users who manage more than 700 web and mobile sites in the U.S. and around the world. OU Campus is secure and scalable, server and platform independent, and seamlessly integrates with other enterprise campus systems. It provides college and university web developers, administrators, and marketers with the user- friendly tools and deployment flexibility they need to achieve excellence. For more information, visit http://omniupdate.com.

About This Guide

This is a custom end-user guide prepared for El Camino College.

OU Campus Support

The Support site is available to everyone and users are encouraged to visit and browse the site for information. An 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. Ways to access the OU Campus support documentation include:

- Support site: http://support.omniupdate.com/
- The help link in the main interface of OU Campus
- The JustEdit Help link
- Help links embedded in the system
- Text instructions are provide onscreen for specific fields and functionality
- Learning Management System (LMS): http://lms.omniupdate.com/
- OmniUpdate Community Network (OCN): http://ocn.omniupdate.com/

Conventions

Shorthand for navigation through the OU Campus CMS is indicated with a greater-than sign and bolded. For example, **Setup > Sites**. Code snippets use `Courier New` and a shaded background.

Contents

Contents **2**
End-User Introduction **3**
OU Campus Support 3
Filter and Quick Search 4
Logging In **5**
Accessing Content Using DirectEdit 5
Logging into OU Campus with DirectEdit 5
Editable Regions 6
Checking Out and Checking In Pages 6
Changing User Settings and Logging Out 8
Editing Content **9**
Overview 9
Editing a Page via the JustEdit Toolbar 9
Editing Page Properties 9
Setting Reminders **11**
Schedule a Reminder 11
Setting a Stale Reminder 18
Versions **13**
Comparing Versions 13
Reverting to a Previous Version 13
Publishing Content **14**
Publish Now ..... **Error! Bookmark not defined.**
Schedule a Publish **Error! Bookmark not defined.**
Submit for Approval 17
Approve and Publish or Decline Content from Other Users ..... **Error! Bookmark not defined.**
Reassigning Approval of Content from Users . 17
Schedule an Expiration 17
Creating Content **19**
Creating a New Page 19
Creating a New Asset 20
Editing Navigation Files **22**
Editing Side Navigation in a Directory 22
Adding New Pages to Side Navigation File 22
Uploading Content **24**
Uploading a File from the Pages List View 24
Uploading a File from the JustEdit Toolbar 25
Gadgets **25**
Sidebar Gadgets 25
Dashboard Gadgets 26
Additional Tools **27**
Page Check 27
Using Assets 28
Using Snippets 30
Using the Image Editor 31
Dashboard **32**
Overview *33*
Workflow *33*
Inbox *33*
Workflow **34**
Overview 34
Status in Workflow *35*
Viewing a Workflow Message *35*
Replying to a Workflow Message *36*
Inbox **37**
Overview 37
Inbox 37
Example of Inbox Gadget in Dashboard *37*
Composing Messages *38*
Viewing, Replying to, and Deleting Messages *38*
Sent 39
Forwarding a Message *40*

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

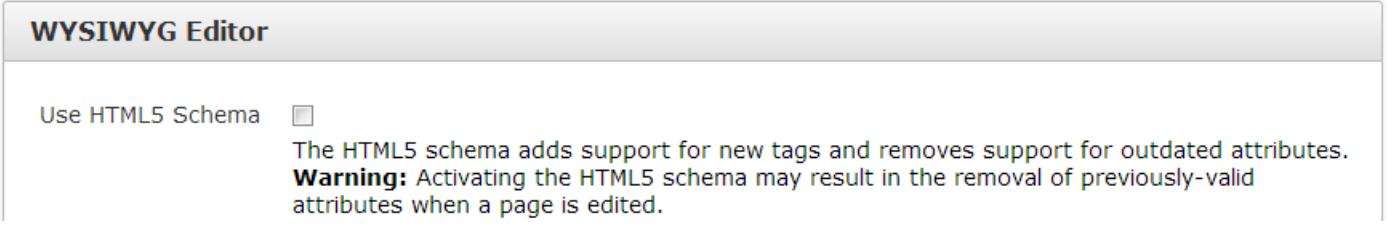
Online support is available through the OmniUpdate Support site at:

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.

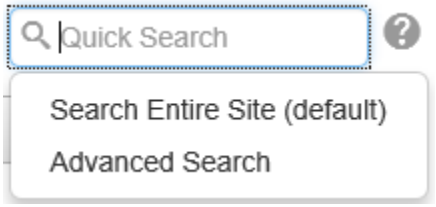
Finally, contextual help may also be found within the CMS as instructions relating to particular fields.



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.

Filter and Quick Search

The Filter tool is available on the Pages list view and many views within the content management system. The Filter tool allows the content listed on the screen to be delimited by the string typed into the Filter field. The filter applies to specific columns that are available on the screen and usually the filter does not apply to the date column.



If the Quick Search functionality is turned on, it is possible to search the entire site for content. This search allows the user to find content in order to easily navigate to a desired page.

On the Pages list view the Quick Search is also the Filter tool. Content in the current view is filter; pressing Enter uses the Quick Search functionality to search the entire site.

Advanced Search allows for additional search criteria to be applied. The search can be narrowed by:

- Content (the search term)
- Path
- Title
- Description
- Keywords
- Other Meta
- Limited in scope to current folder and below
- Limited in scope to only pages to which the user has access

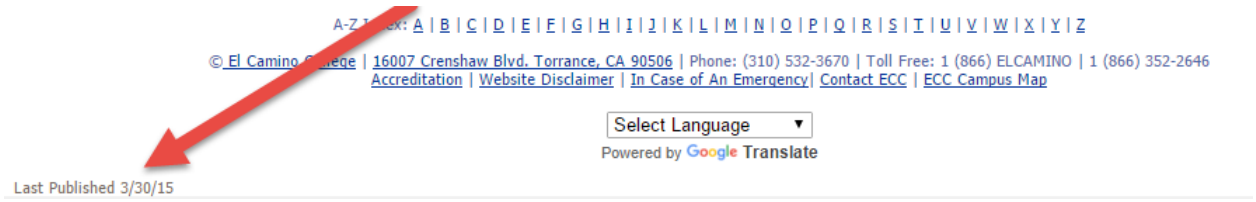
Logging In

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.

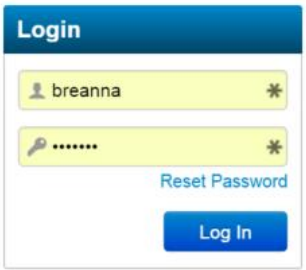
Logging into OU Campus with DirectEdit

1. Navigate to the desired page on the “live” website
2. Click the **DirectEdit** link on the published page. For El Camino College’s website, the DirectEdit link is the “Last Published” timestamp in the bottom left-hand corner.



3. Use the login credentials that have been provided to you by an administrator at your school.
    - Username: first initial, last name, i.e. hsolo **just as it appears in your El Camino network/email ID**
    - Default Password: first initial, last initial, 1234, i.e. hs1234

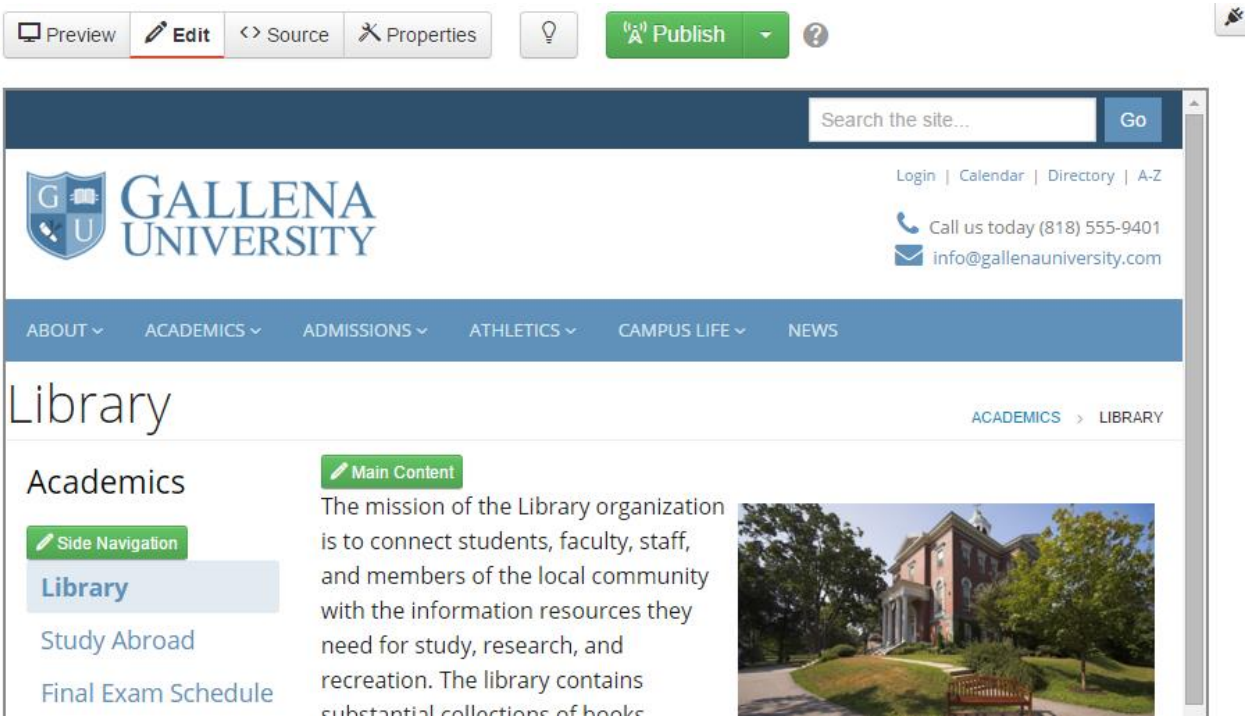
    NOTE: If you fail to type the correct username and/or password for three consecutive attempts, your account will be locked and you must contact the El Camino Web Developer at **webdeveloper@elcamino.edu** to have it reset.



4. Once on the page, select an editable region and click the green **Edit** button to begin editing using the JustEdit Toolbar.
5. Edit the page and save changes. Preview the changes and **Publish** them (or send to an approver if you cannot publish on your own).

Editable Regions

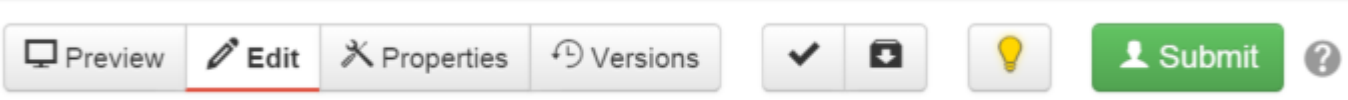
The page may include many editable regions, just one editable region, or may provide an Image Gallery or Banner Image Chooser by which only a specific content type can be selected. For example, the following image shows two editable regions, each of which is edited separately from the other regions. Editable regions are available in Edit mode for a particular page. Note: DirectEdit login will automatically bring you to Edit mode for a page and display the available editable regions.



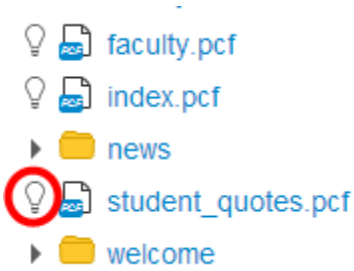
Checking Out and Checking In Pages

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

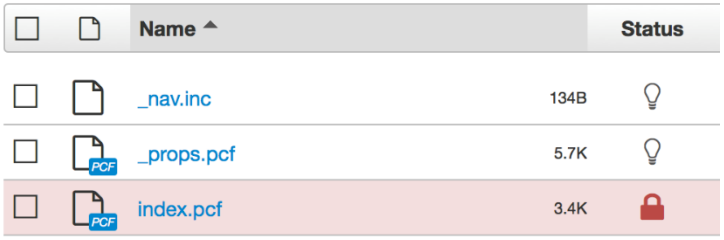
1. Click the Lightbulb icon in the Page Actions toolbar while editing any page to check out a file. This will lock the file to you, so other users will not be able to edit the content until the file is checked back in or published.



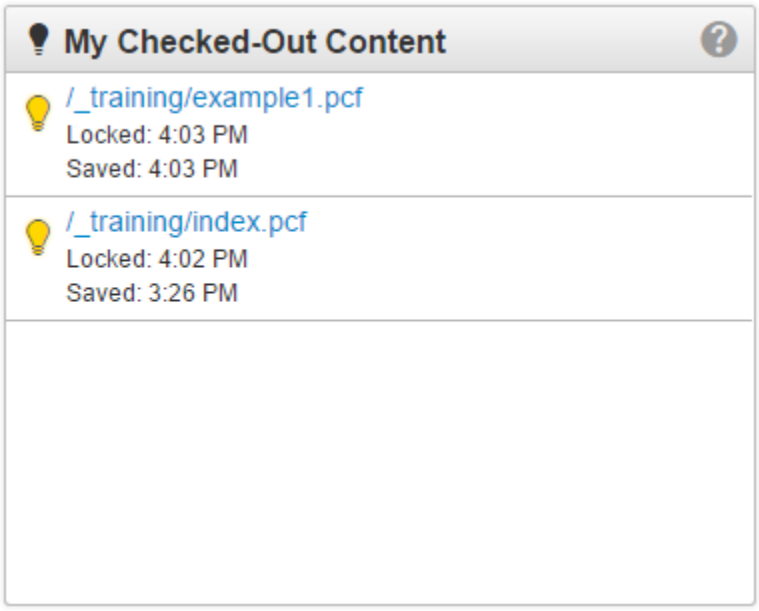
2. Alternatively, you can check out files from the File Navigation Sidebar or the **Content > Pages** list view. Click the Light Bulb icon for any page to check the file out. You have multiple files out checked out simultaneously.



3. Clicking the Lightbulb again will check the file back in. Neither action can be performed if the Lightbulb icon has been replaced by a Lock icon, indicating the file is already checked out to another user.



4. Keep track of checked out content in the “My Checked-Out Content” Gadget either from the Gadget Sidebar or in Dashboard.

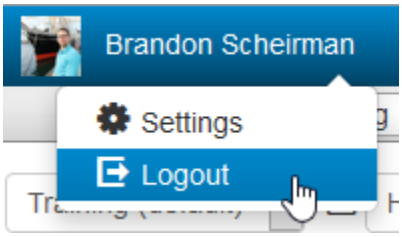


Changing User Settings and Logging Out

Users can change their own settings or log out of OU Campus via the global navigation bar.

To log out:

1. Hover over your user name.
2. Choose **Logout** from the menu.



3. The original **Login** screen will be shown unless otherwise configured.

To change your user settings:

1. Hover over your user name.
2. Choose **Settings** from the menu.
3. Change any information desired (password, contact info, etc.) and click **Save** at the bottom of the page.
4. To have a user avatar appear next to your name, set up a Gravatar profile at http://gravatar.com and use that email address in the **Email** field in User Settings.

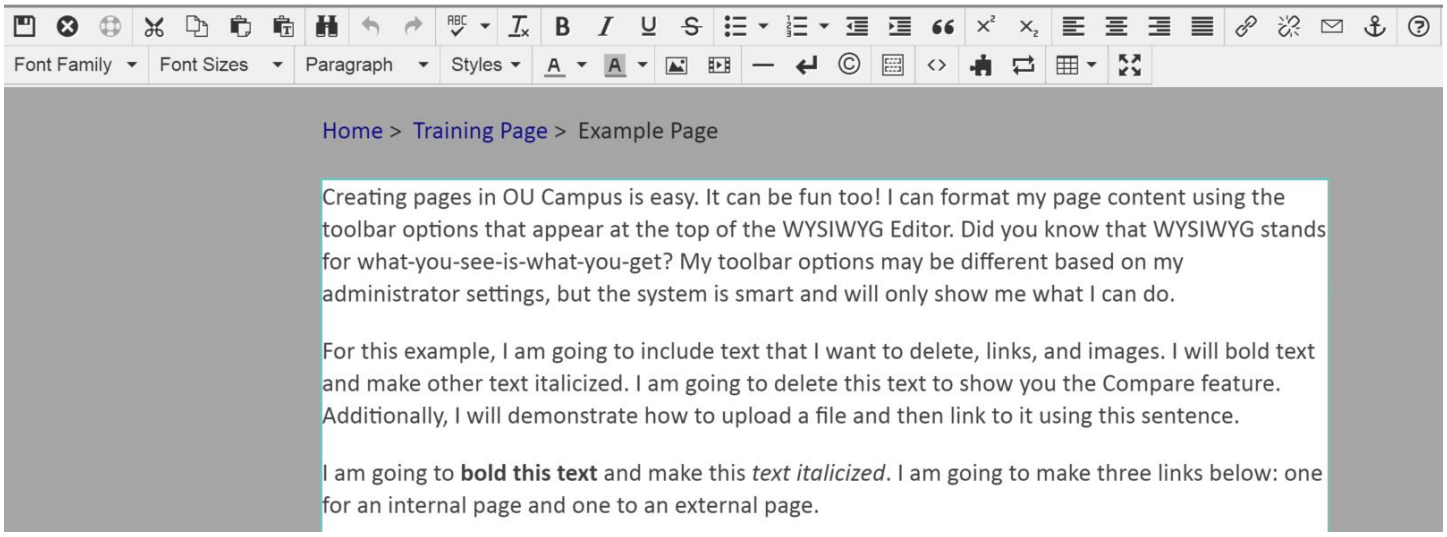
Editing Content

Overview

There are several types of editors available to edit pages in distinctly different ways, but the JustEdit editor is the most common way for users to edit pages in OU Campus. The JustEdit (What You See Is What You Get) Editor allows for a familiar experience of editing a page similar to that of many web applications and traditional word processors.

Editing a Page via the JustEdit Toolbar

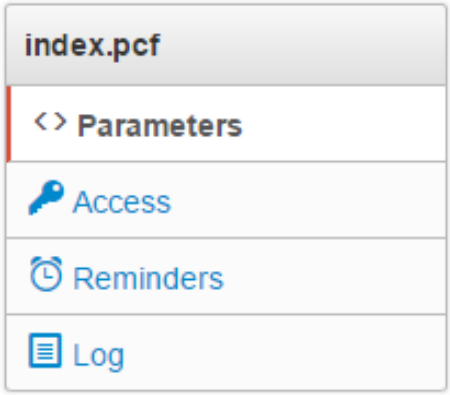
1. Navigate to the page to be edited and log in using your provided credentials.
2. Select an editable region by clicking one of the displayed Edit buttons. This opens the JustEdit Toolbar.



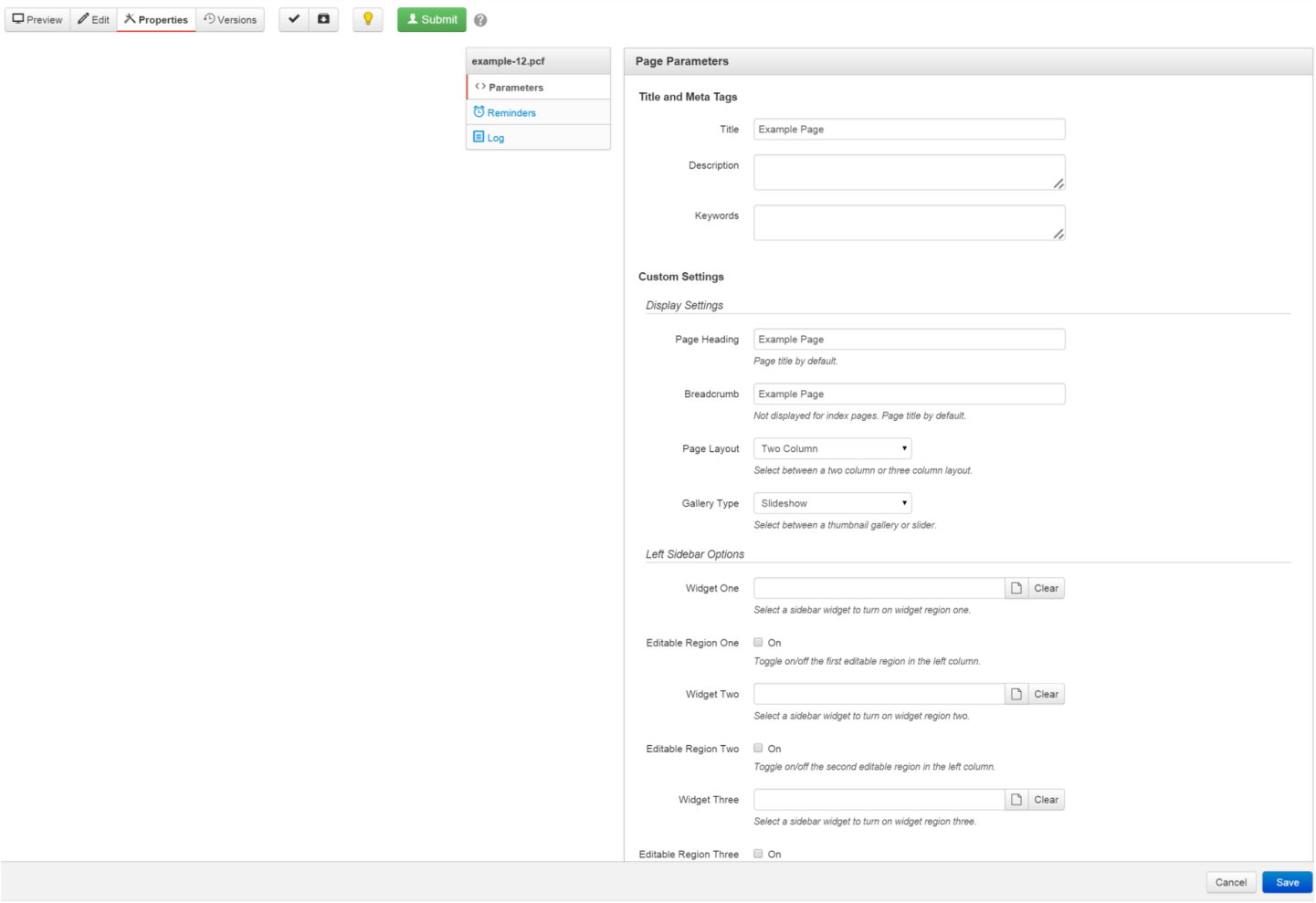
3. Make any necessary changes using the toolbar and click **Save and Exit** when done.

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.



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**.

MultiEdit

A MultiEdit region is a type of editable region on a page similar to an editable region that uses the WYSIWYG Editor. It is a way to quickly enter information for several fields without having to worry about layout or formatting, which is handled by the MultiEdit template.

Accessing MultiEdit content is accomplished in a manner similar to accessing any editable region, except instead of clicking an Edit button, the orange MultiEdit button, found at the top of the page, is used. When viewing a MultiEdit-capable page in Edit mode, other Edit buttons might also be viewable, such as for an INC file for a navigation bar.

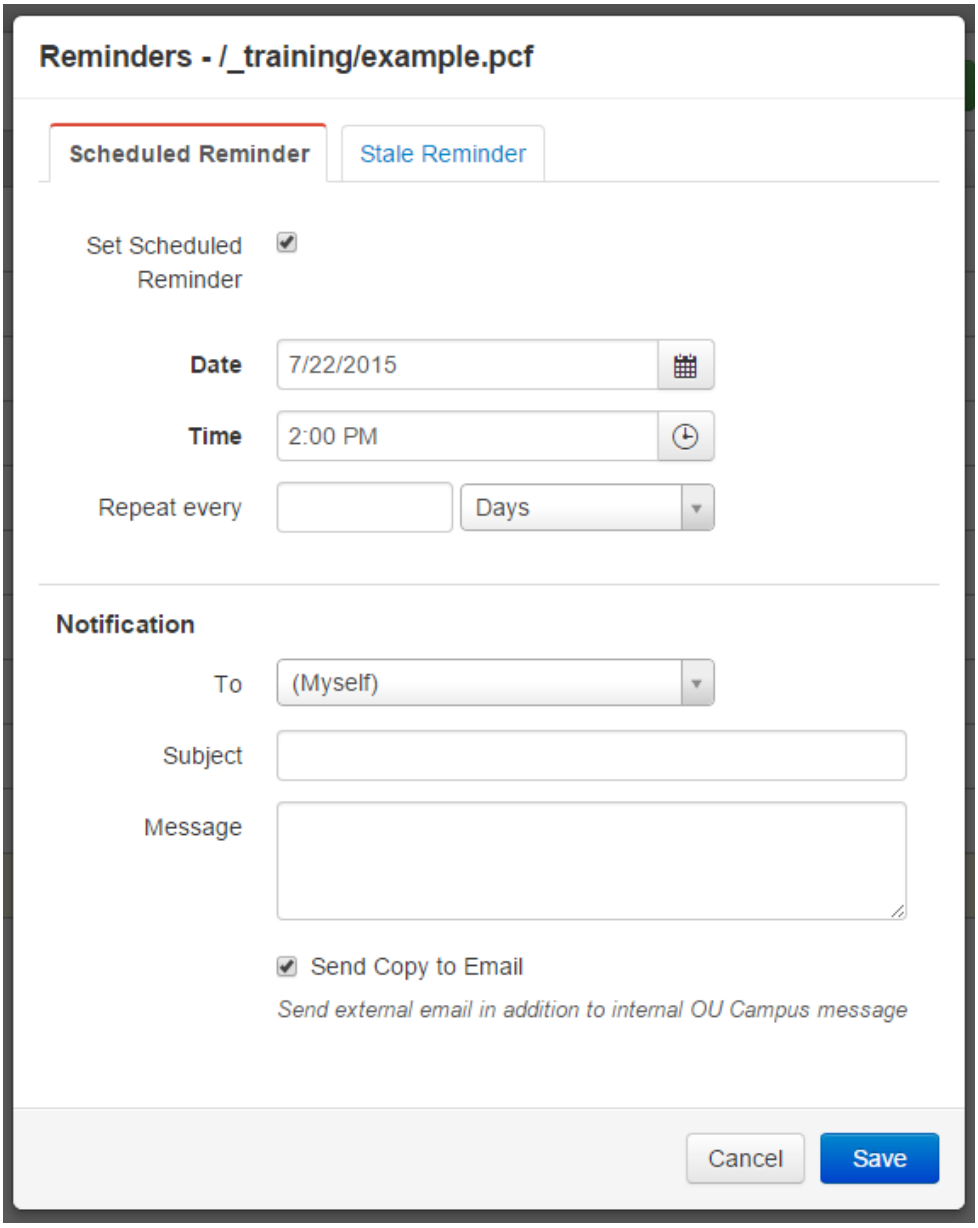
MultiEdit is most frequently used for faculty pages and the faculty directory. The traditional implementation for faculty pages includes the index page for the directory which is auto-populated and is not usually edited. The individual faculty pages are used to build the index. Each faculty or staff member has his or her own page, which they can log in to and update. A user can also navigate the file structure to locate and edit the content.

Note: *If a web page has MultiEdit tags, JustEdit is disabled automatically for that 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.

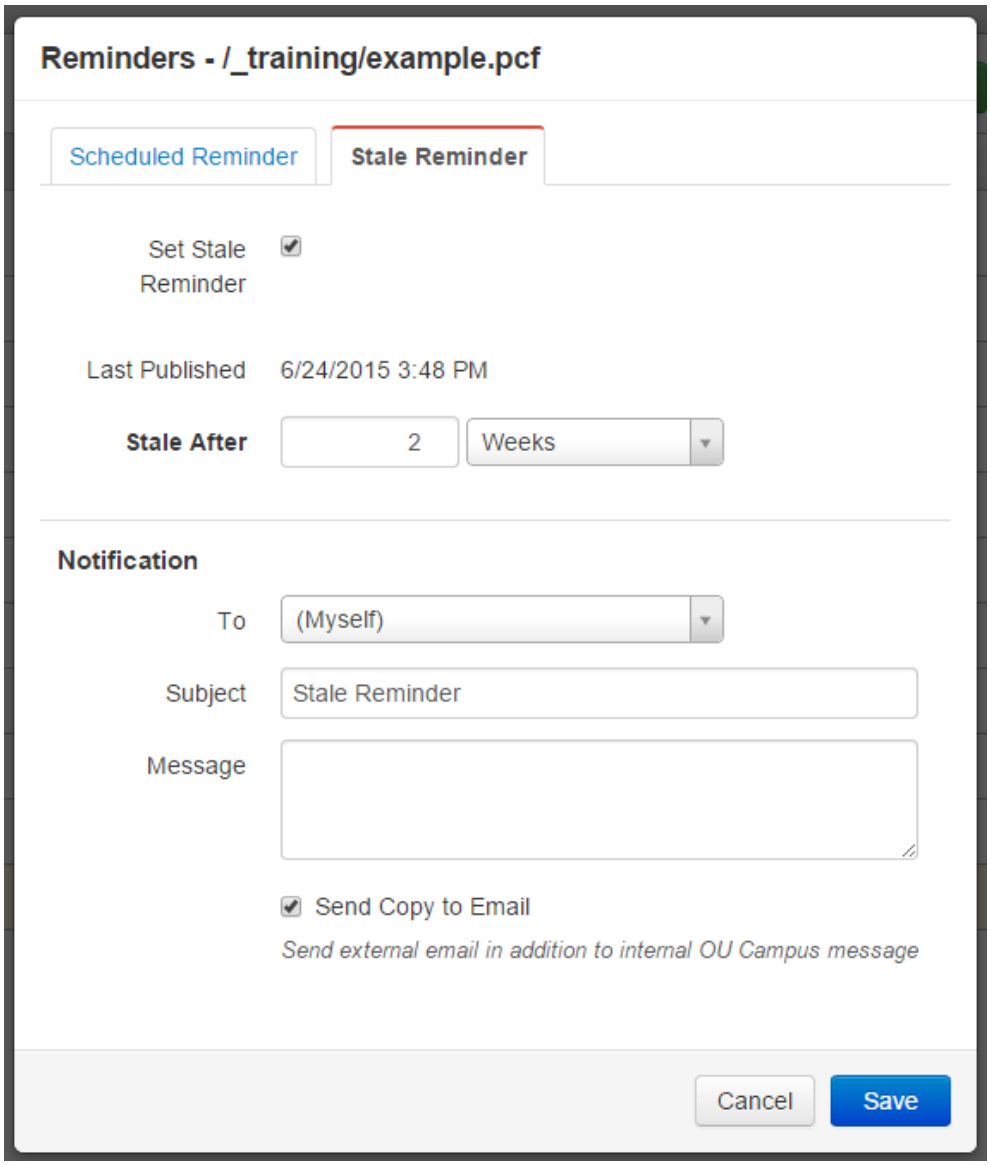


Setting a Stale Reminder

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:

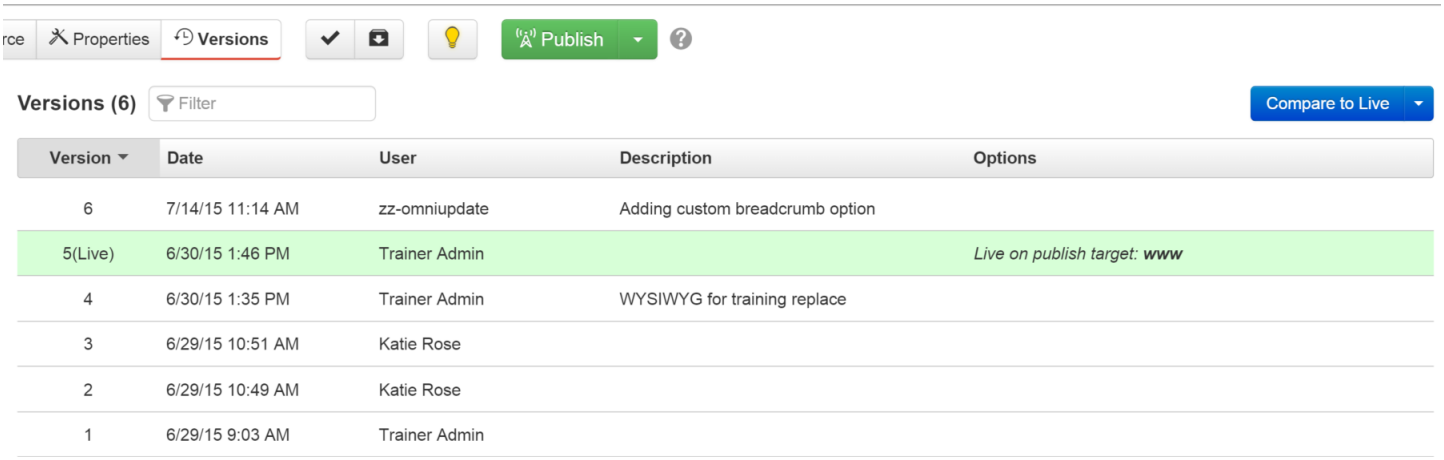
1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over the pages content's row and select **Reminders** from the Edit menu. This option is also available in the Reminders section of Page Properties.
2. In the Reminders modal, select the checkbox 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.



Versions

Comparing Versions

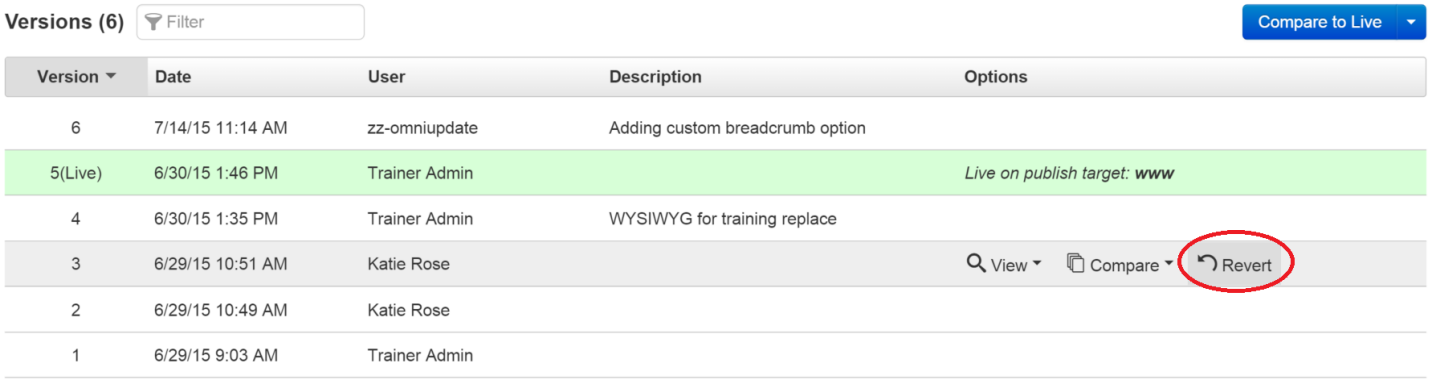
1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Check out the page and hover over the page's row and select **Versions** from the Review menu. Additionally, click on the content's hyperlinked name and select **Versions** from the Page Actions toolbar.



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

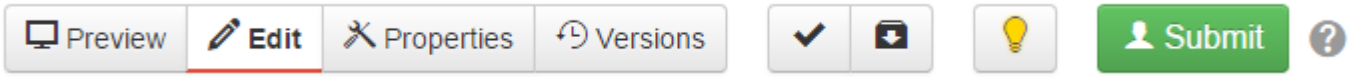
1. In the Versions view, hover over the version's row and select **Revert**. This will revert the page on staging to the selected version. The page must be published before the change is reflected on the live site.



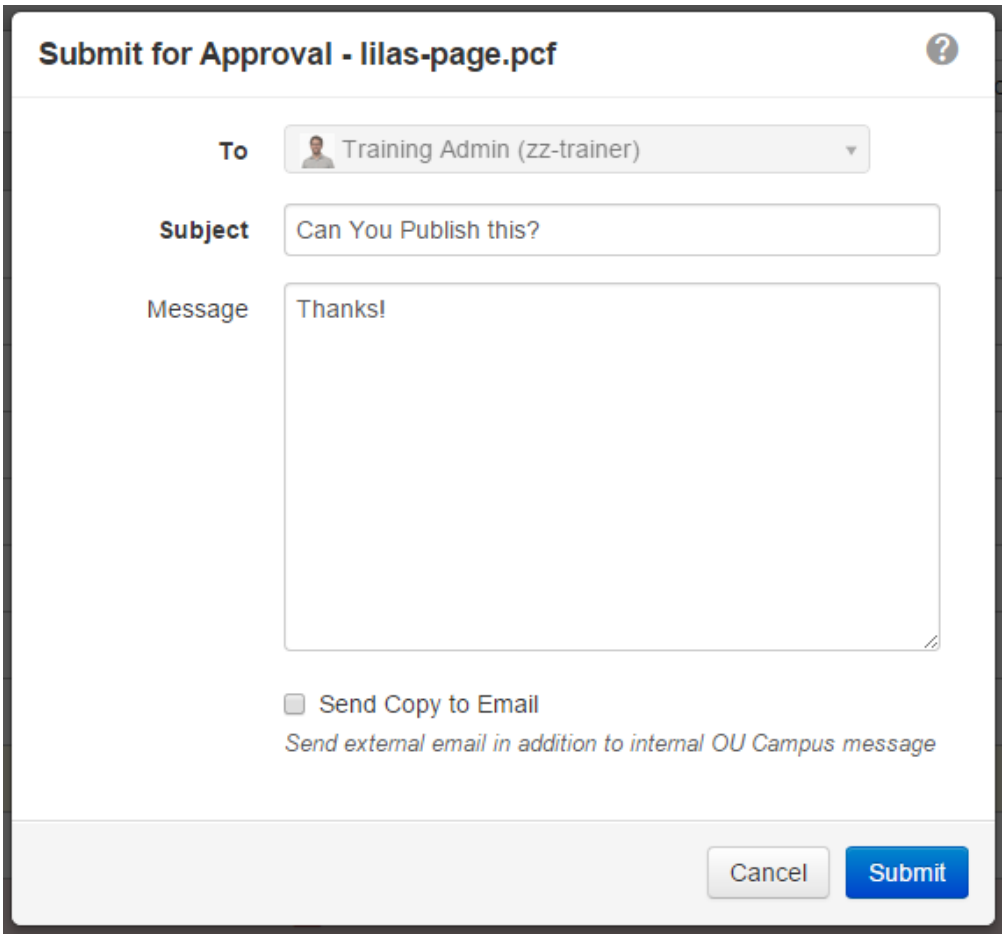
Publishing Content

Submit for Approval

1. 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.



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**.

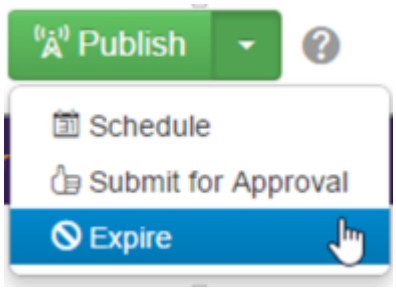
2. Click the drop- down arrow on the Publish button and select **Reassign**.

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.

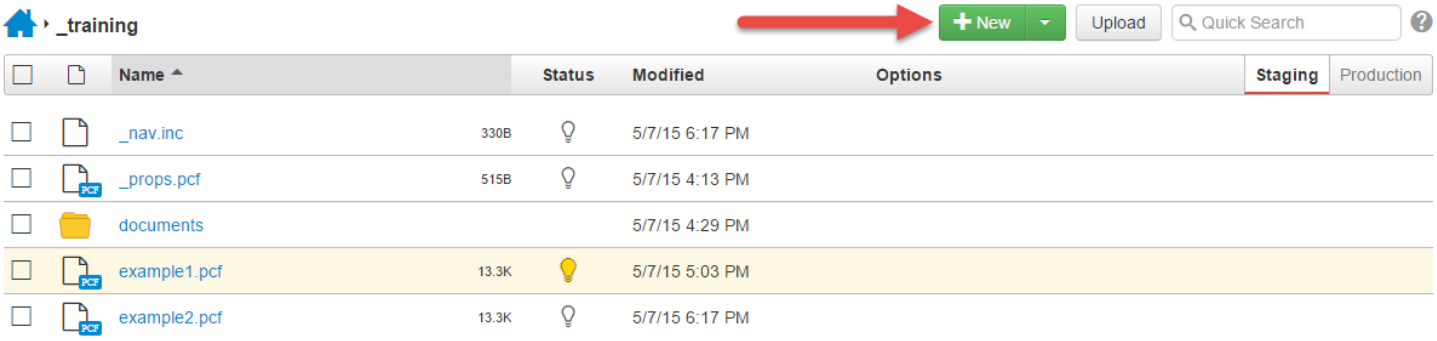
5. Click **Schedule** when finished.

Creating Content

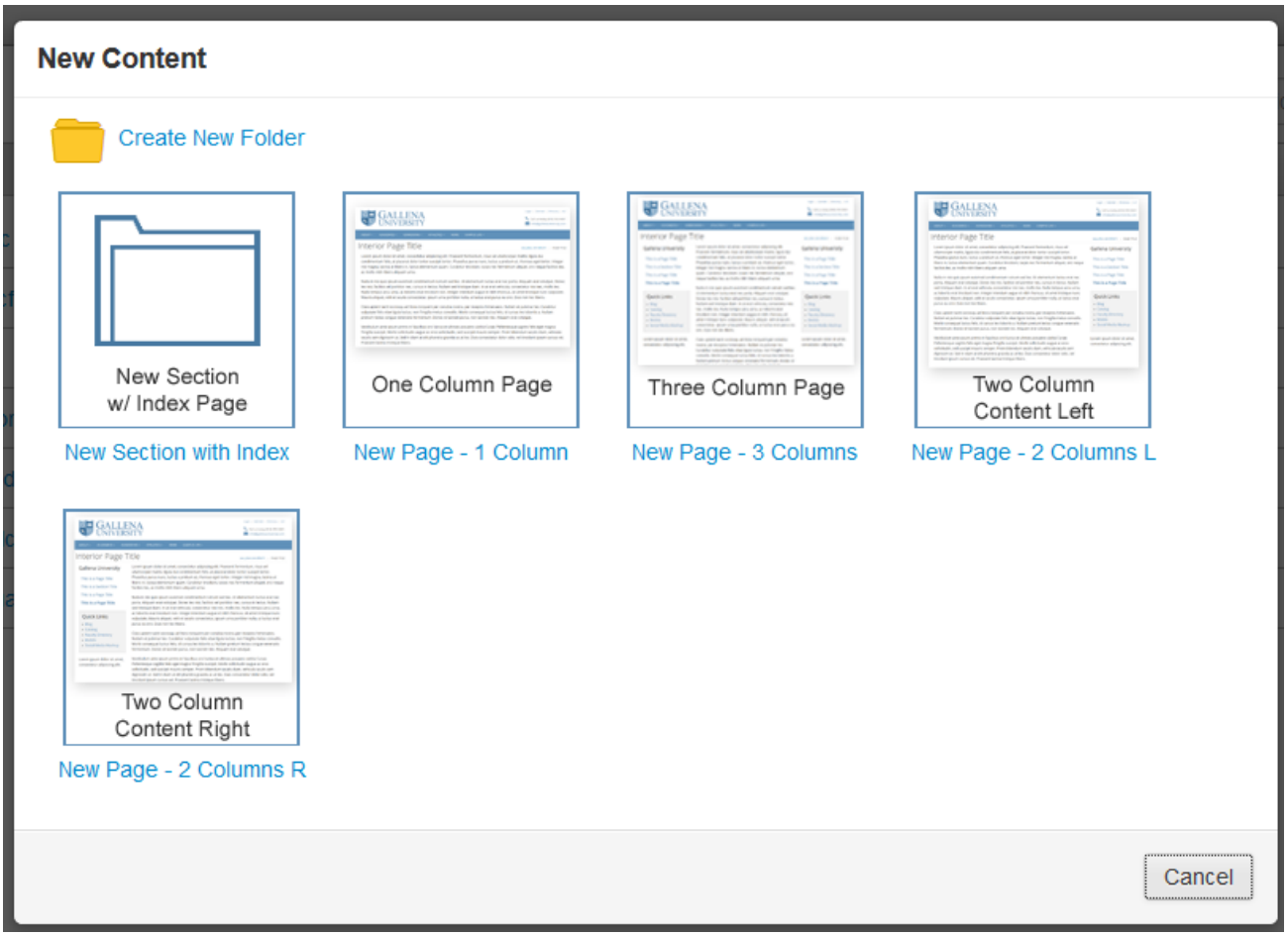
Creating a New Page

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

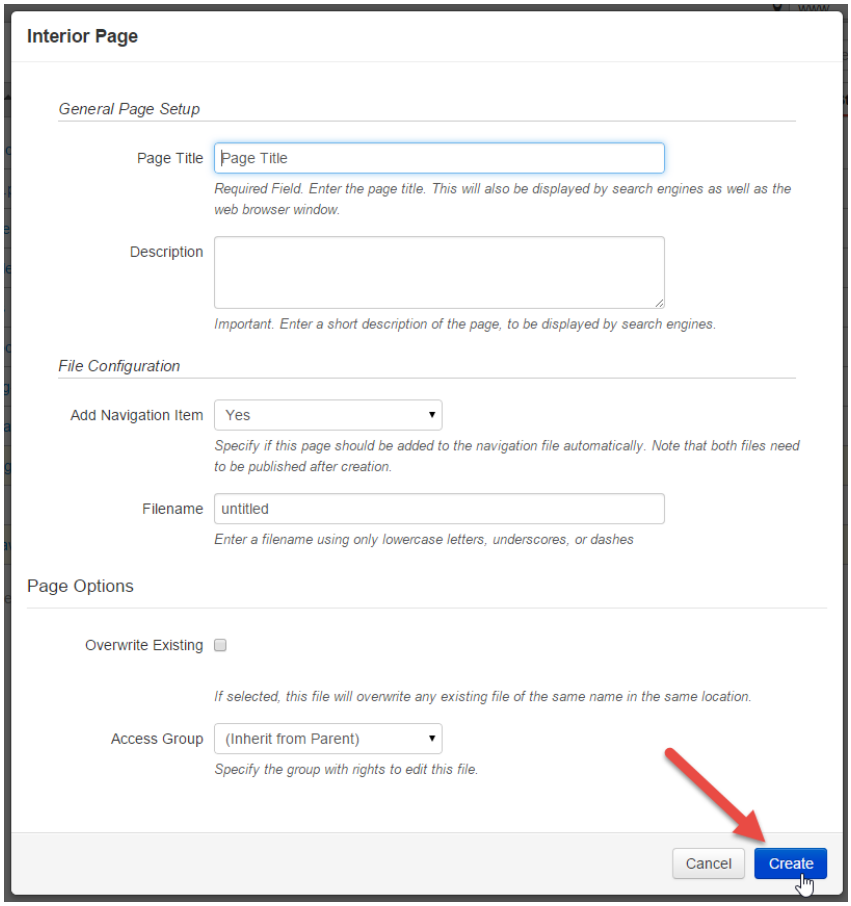
2. Click New.



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.



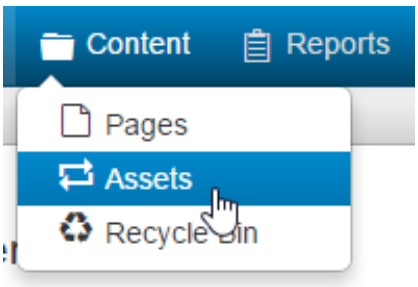
4. In the Interior Page form, fill out or modify all fields displayed and click Create. This will create an entirely new page on the staging server in OU Campus, which can then be edited and published to add new web



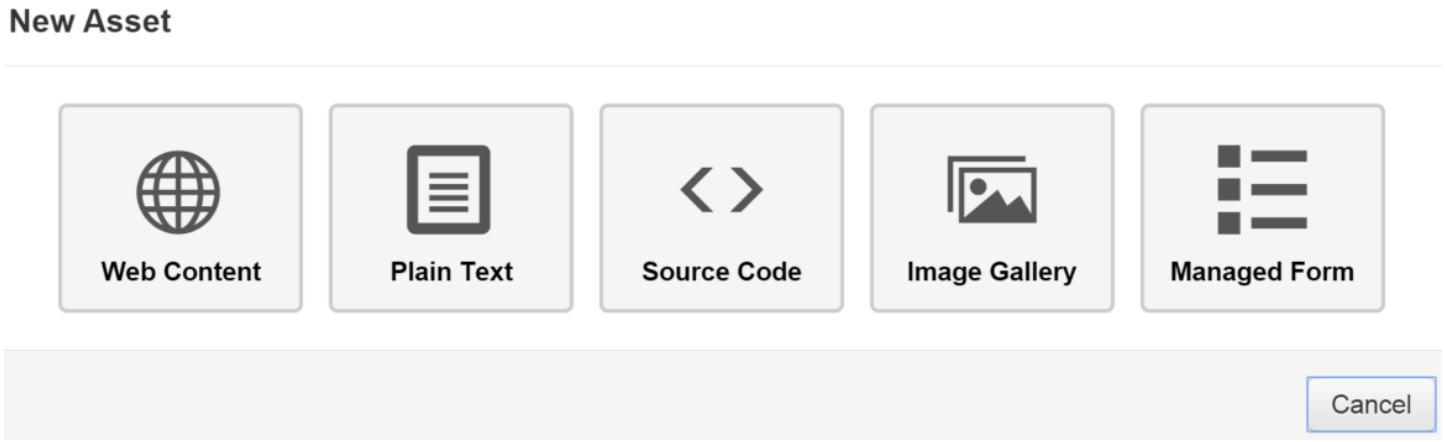
pages to the live site.

Creating a New Asset

1. Navigate to the Assets list view by selecting **Content > Assets** from the global navigation bar.

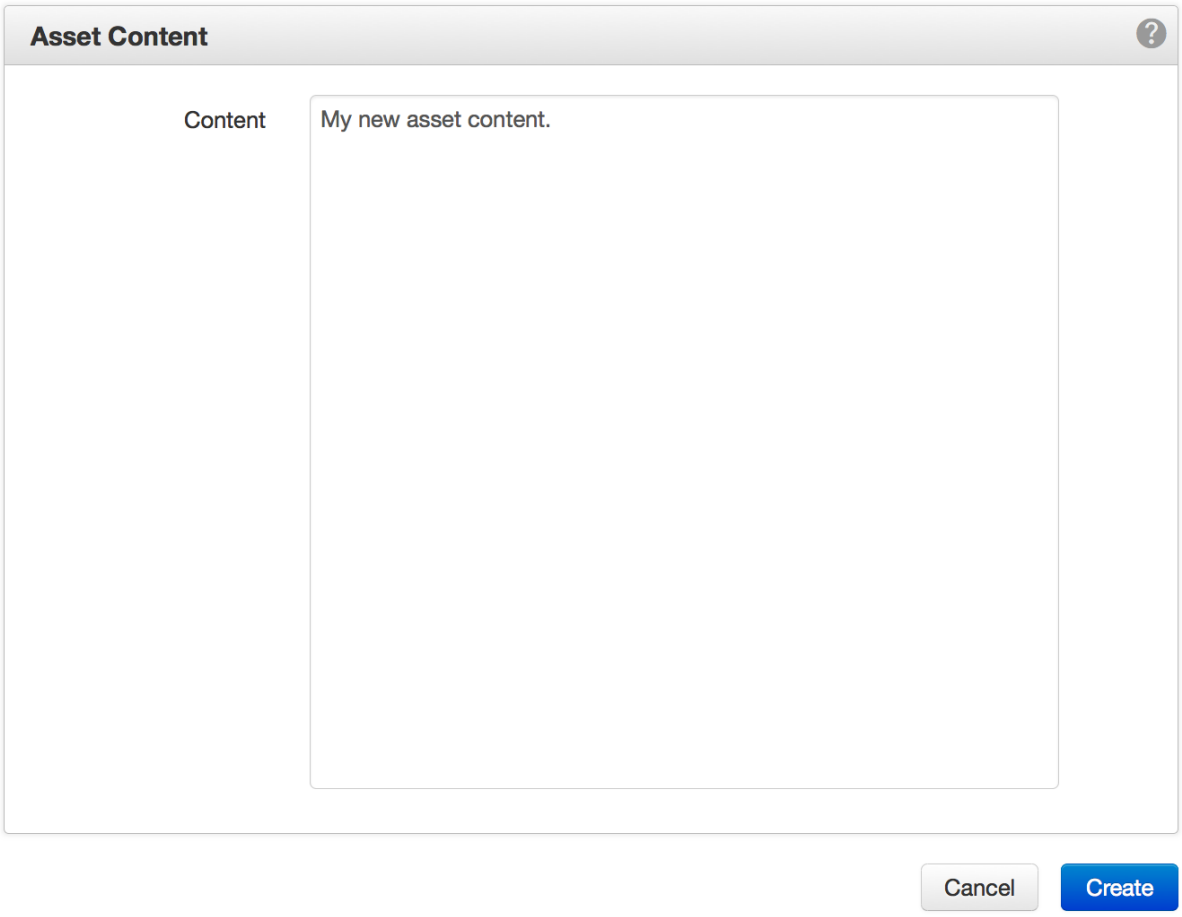


2. From the Asset Manager screen, click **New** and then select a type of asset to create from the New Asset modal. Depending on your access settings, you may only be able to create a few of these asset types.



3. Fill out all necessary text fields and set permission levels using the drop-down menus in the Access Settings panel.

4. For Plain text or Web Content assets, create the content using the Content field. For Image Gallery assets, edit the Gallery Options before adding images. For Managed Form assets, add form Elements, an Email Message, and edit the Form Settings.



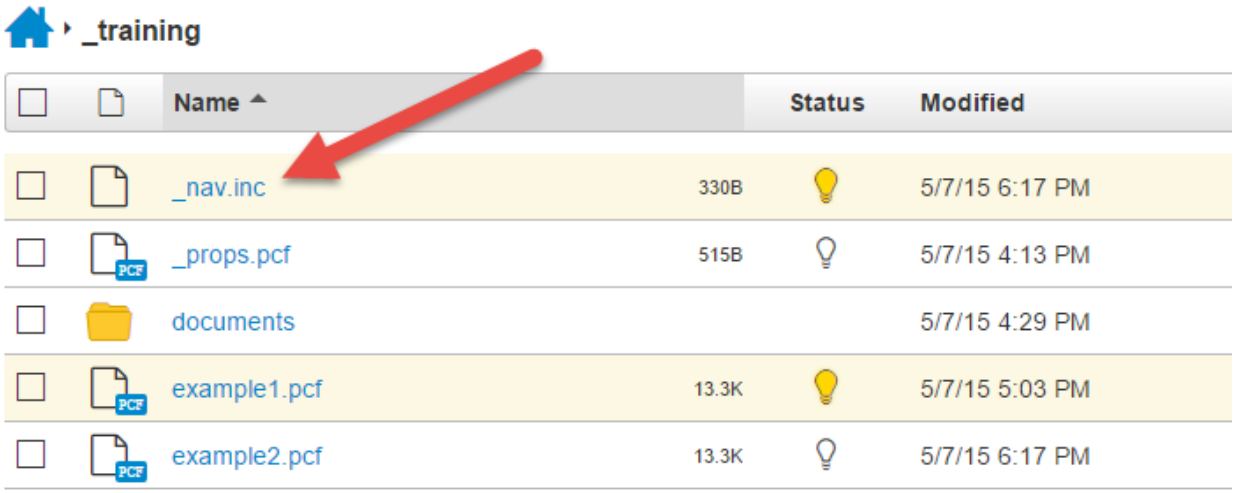
5. The newly created asset will be added to the Assets list view. The new asset will also be available for other users to add directly to their pages using the Insert Asset icon in the JustEdit toolbar. **Note:** Changes to the asset cannot be made from directly in the JustEdit editor. If changes are desired edit the

original asset in **Content > Assets**. Any changes made to the asset will update universally to all subscribing pages once the changes are republished.

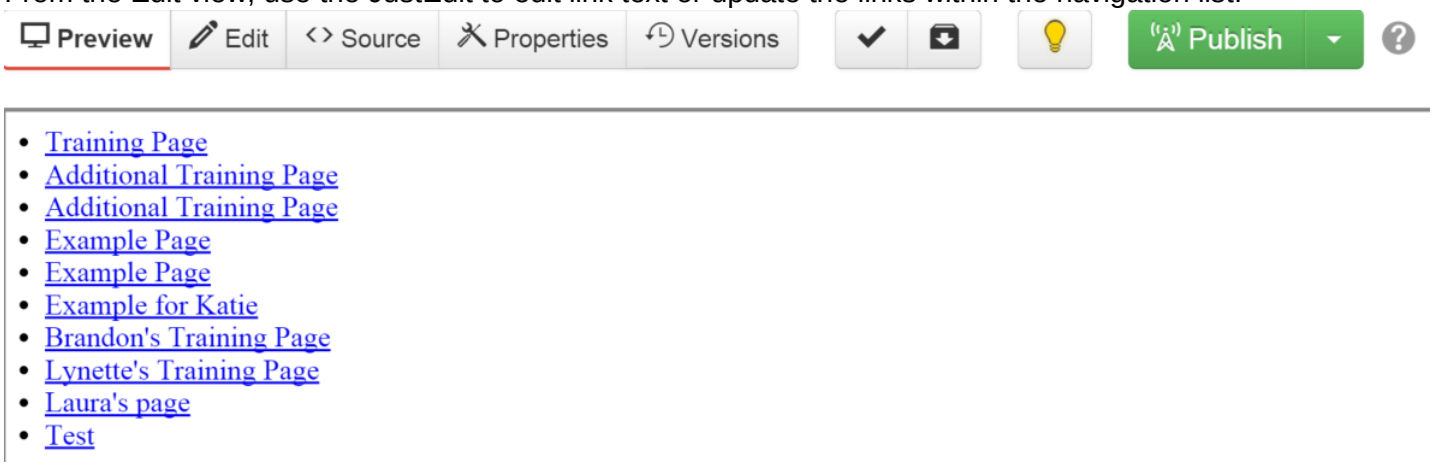
Editing Navigation Files

Editing Side Navigation in a Directory

1. Navigate to the _nav.inc navigation file for the directory. This file will be located inside each section of the website.
2. Check out the file and navigate to the edit menu OR click on the link and go directly to the page and then check out the file to begin editing.



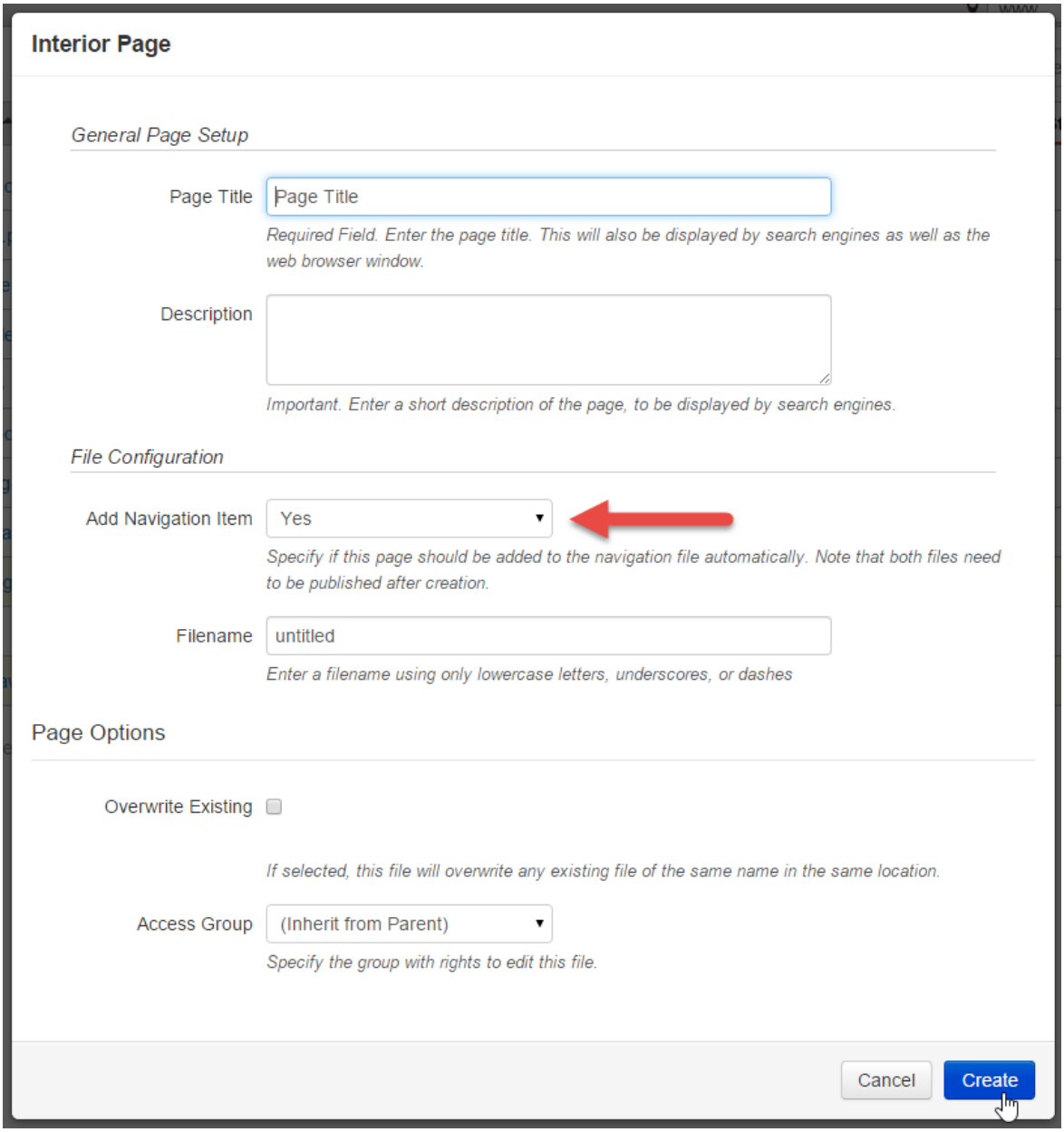
3. From the Edit view, use the JustEdit to edit link text or update the links within the navigation list.



4. The _nav.inc file must be published or submitted for approval, similar standard pages in the directory, in order for the changes to be reflected on the live site.

Adding New Pages to Side Navigation File

1. New pages can be added to the _nav.inc file during new page creation automatically from the new page form. This option is listed as **Add Navigation Item** and is available under the File Configuration heading. Yes is the default option. If the page should not be added to the side navigation file automatically, then change the option in the drop down menu to No.



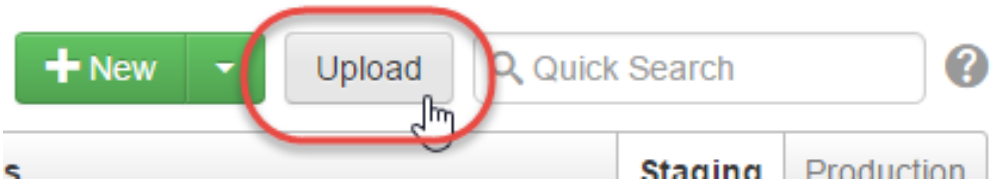
Note: Both the new page AND the _sidenav.inc files will both need to be published before the new content appears on the live website. Users in a workflow would submit the _sidenav.inc file for approval, with the same steps used for sending a page for approval.

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.

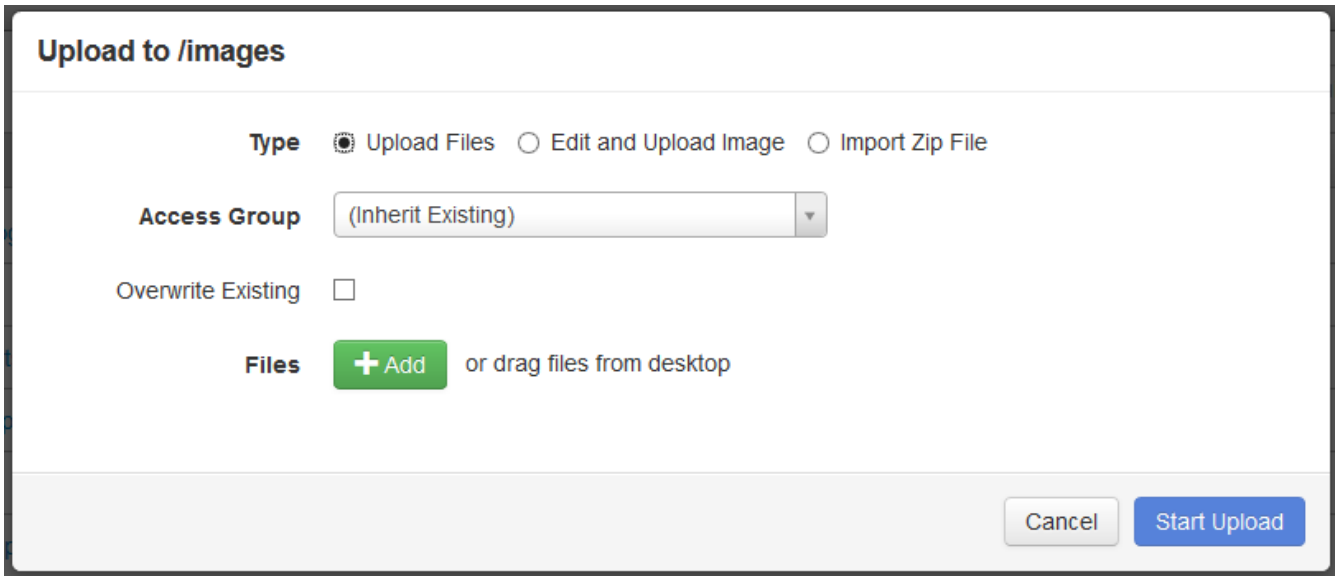
2. Navigate to the directory in which the content will be uploaded and click **Upload** to open the Upload modal.



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

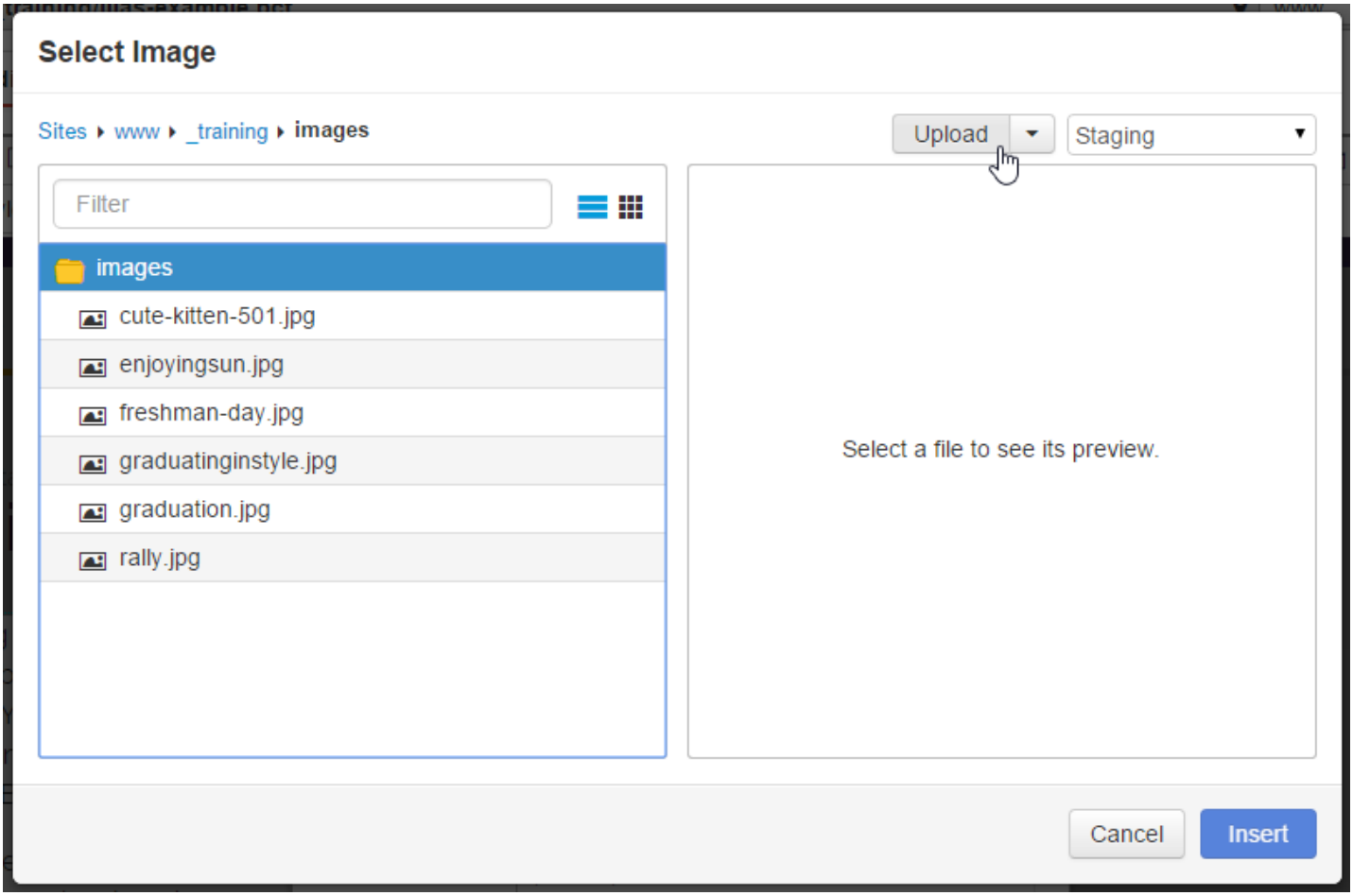
4. Click **Add** to open the file browser, or drag and drop the files directly into the Upload modal from any external source including the user's desktop.

5. Click Start Upload.



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. Select one of the radio buttons in the Upload Type parameter to define the type of upload.
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**. 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.

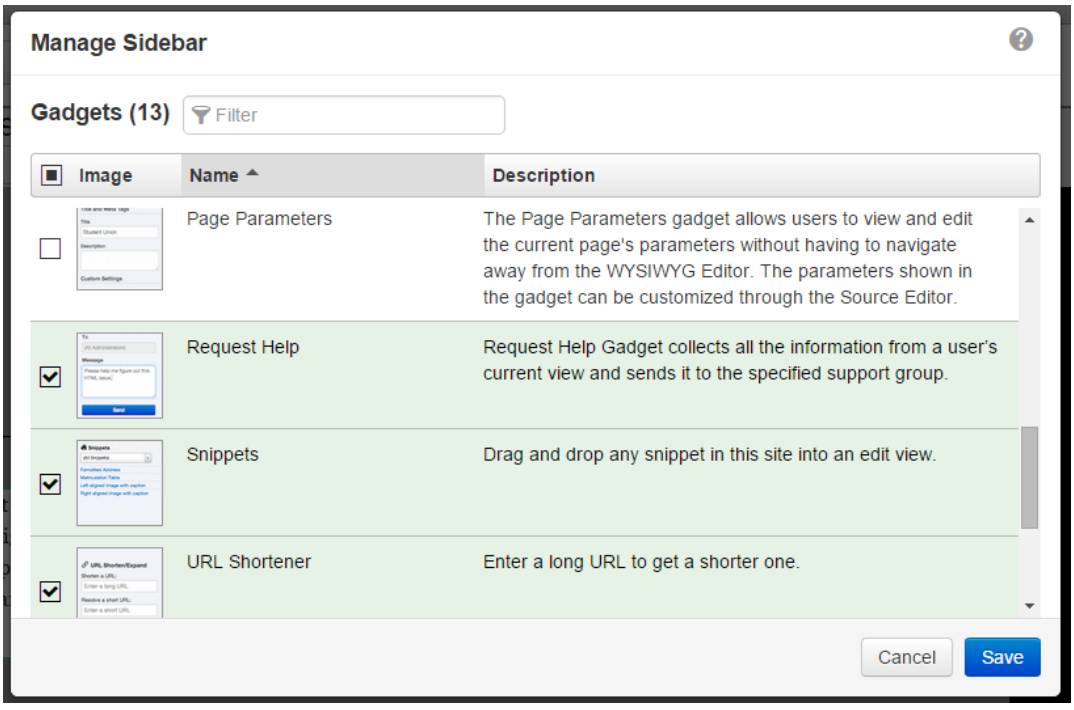
Gadgets

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

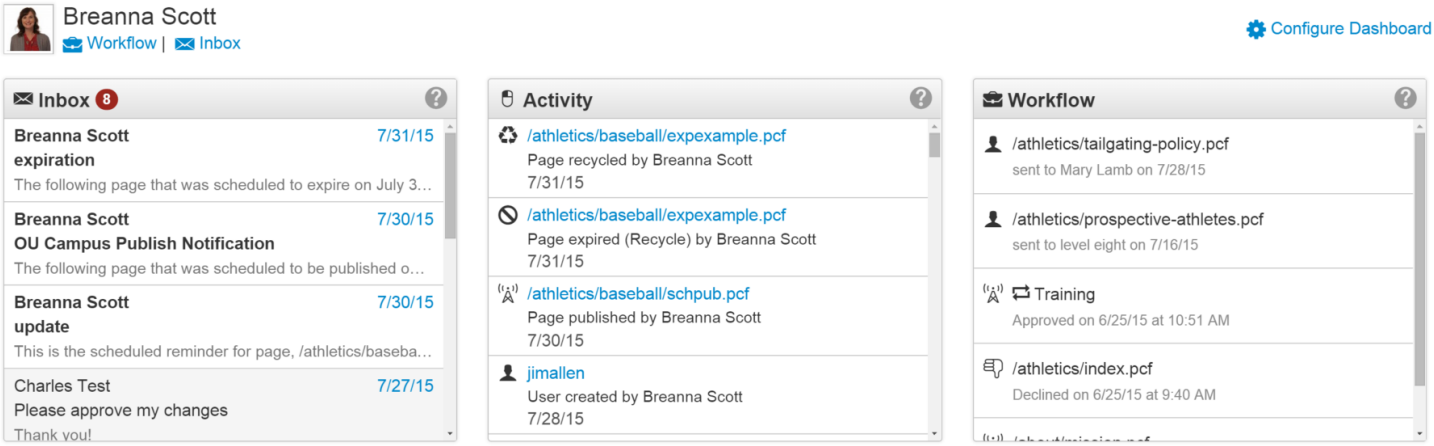
1. From any view in OU Campus, select the **Show Gadgets** icon in the top right corner of the screen to expand the Gadgets sidebar.

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.

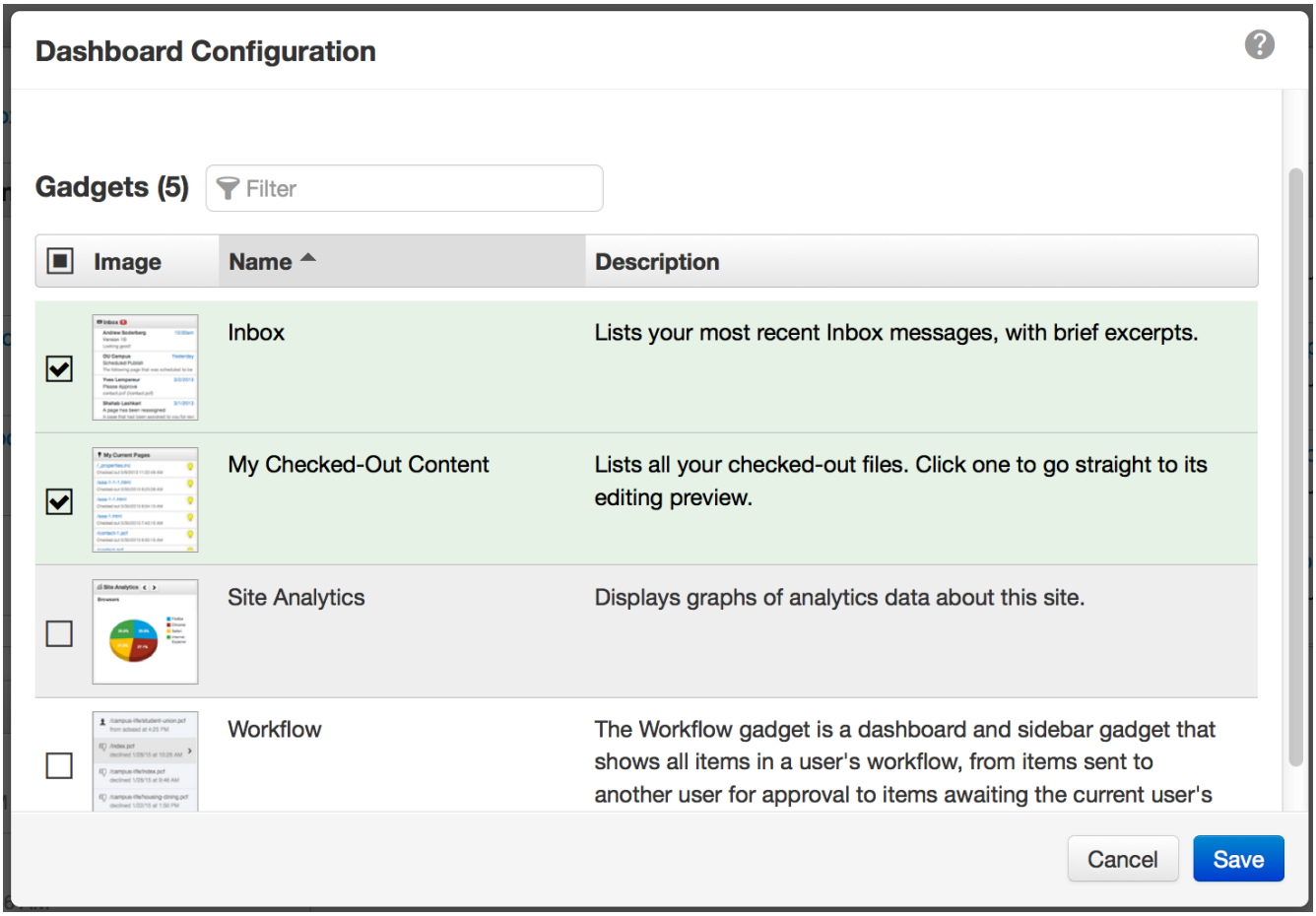


Dashboard Gadgets

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



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.



Additional Tools

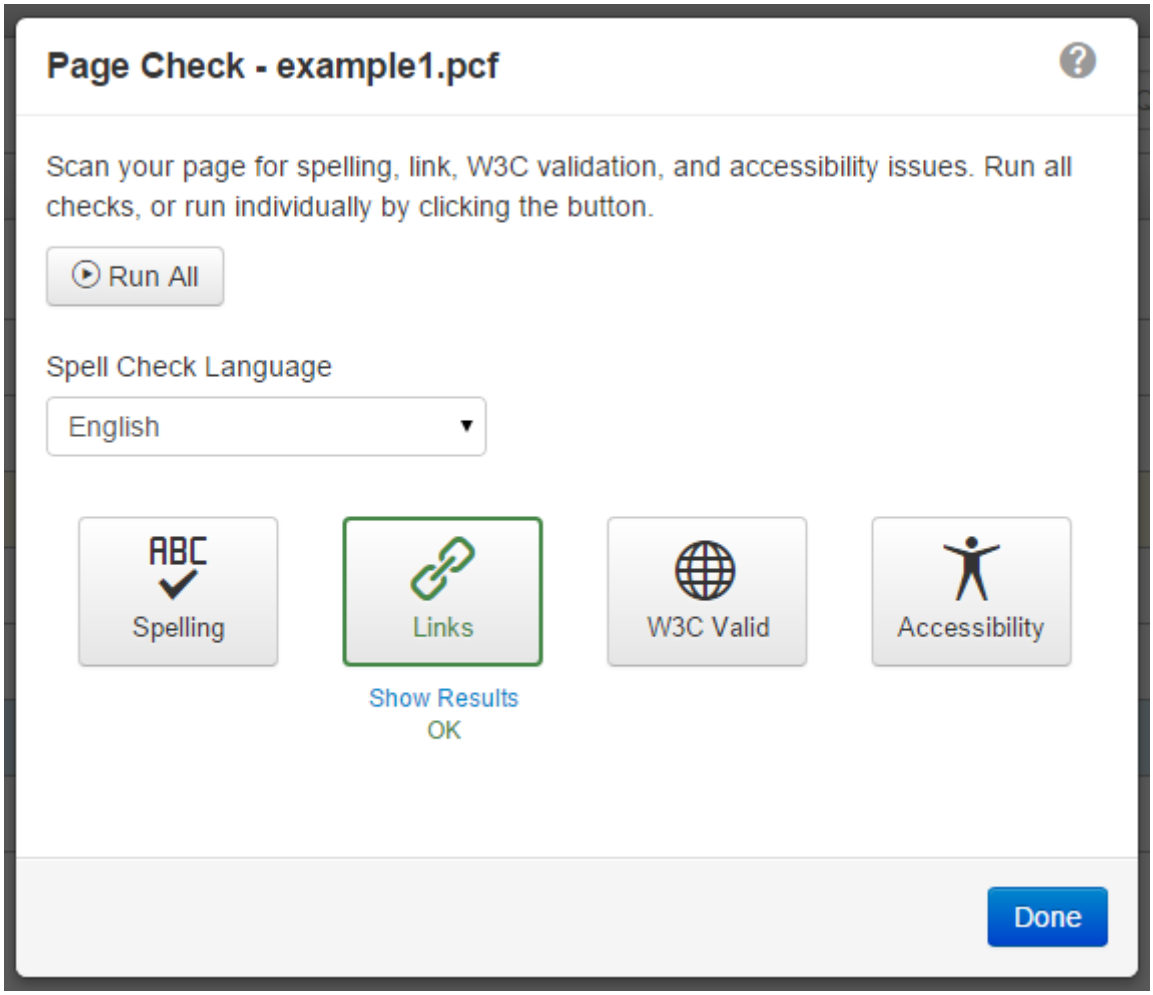
Page Check

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 Che**ck 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.



4. Review results and click **Done** when finished.

Using Assets

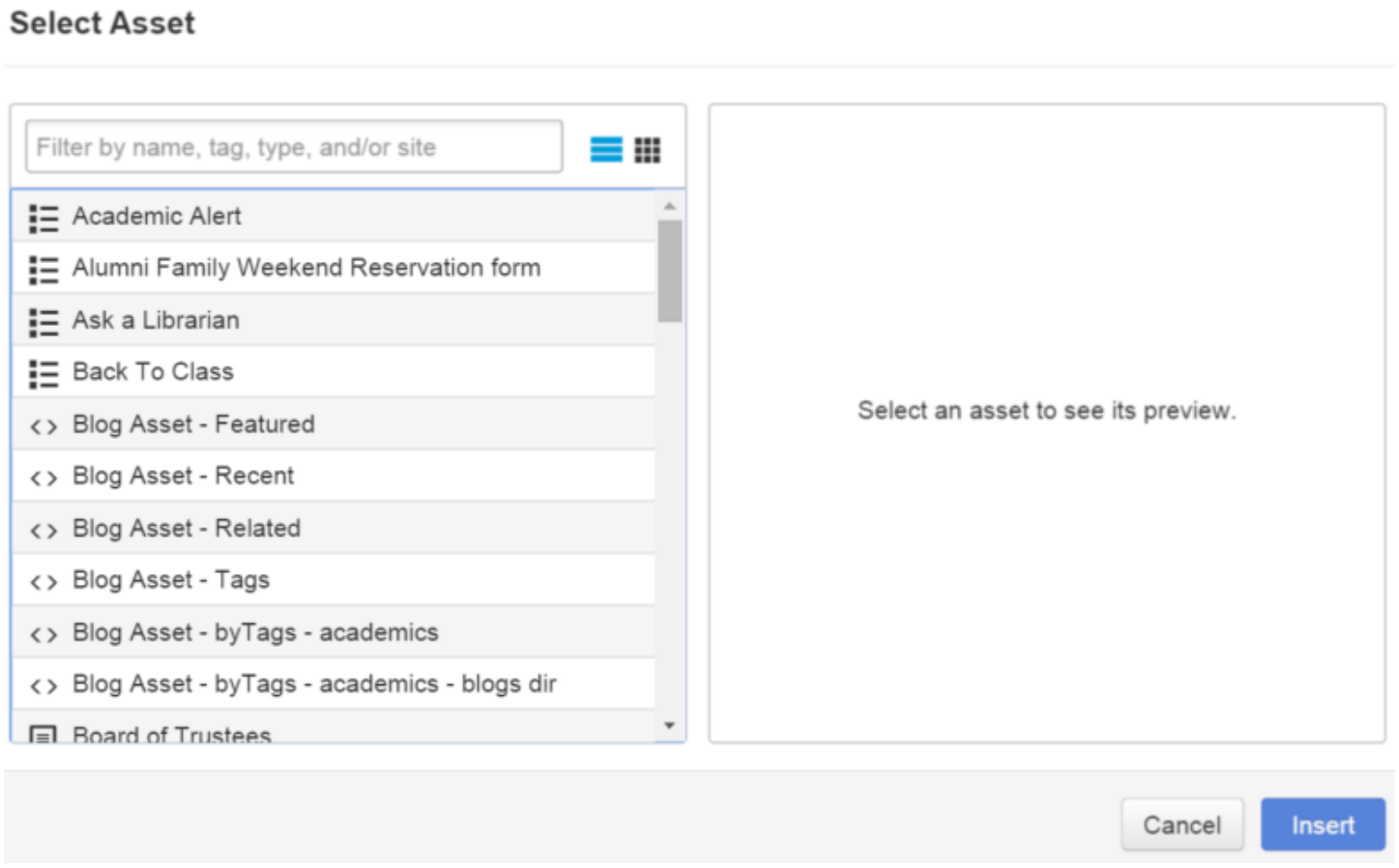
Assets are a type of reusable content inside OU Campus. They are managed centrally from **Content > Assets** and can be placed on any number of pages. When an asset is edited and published, all pages subscribing to that asset are automatically republished to reflect the change.

To insert an asset:

1. Select a page for editing and open the JustEdit Toolbar by entering an editable region.

2. In the JustEdit Toolbar, place your cursor where the asset is to be inserted and click the **Insert Asset** icon from the toolbar.

3. Select an asset to include from the Asset Browser modal and click **Insert** to include the asset in the page.



Note: Assets cannot be edited or rendered in the WYSIWYG. To view an asset, save the page and exit the JustEdit editor. Assets can be viewed in either the Edit or Preview view before the page is published.

Using Snippets

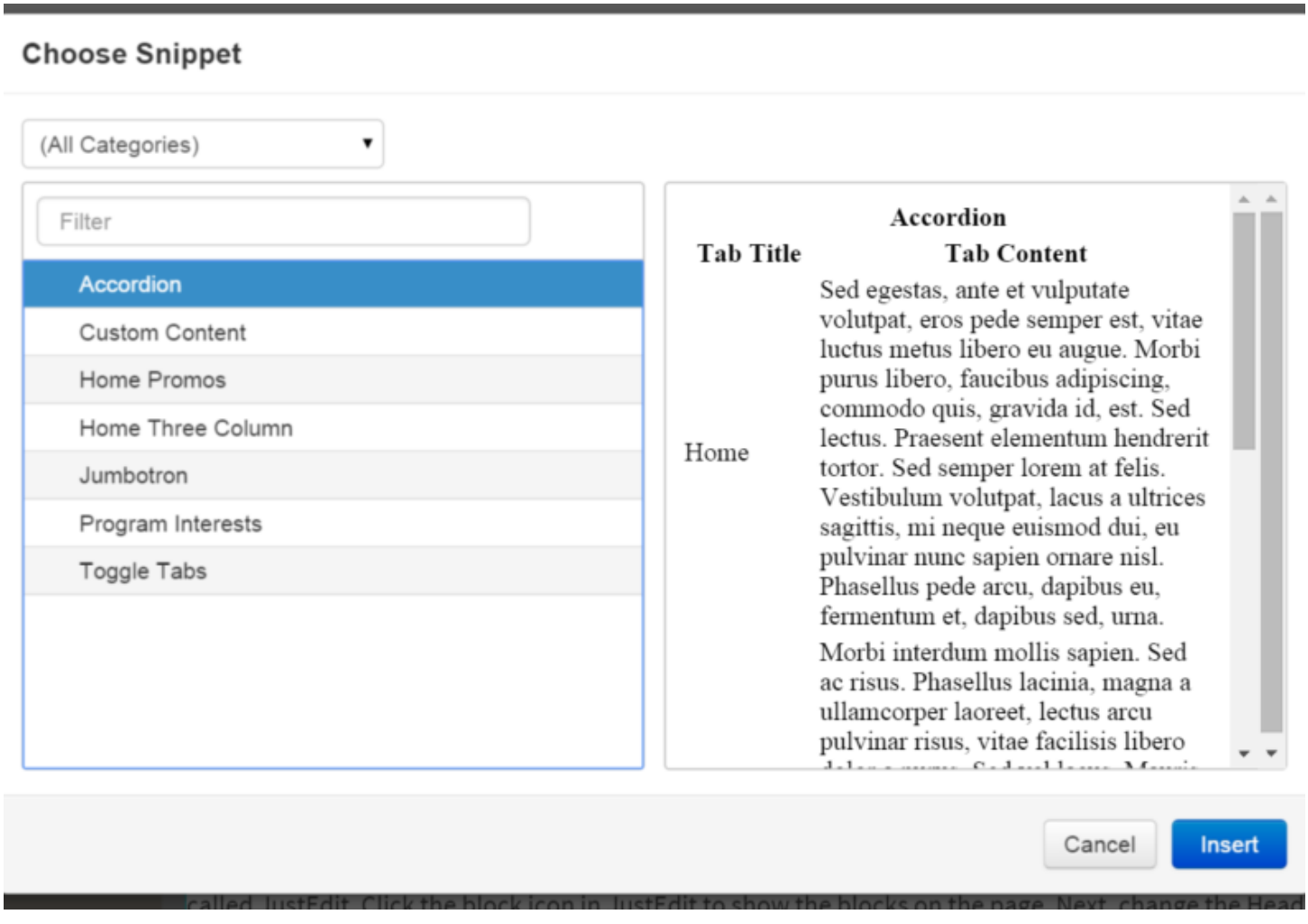
Snippets are the other main type of editable content in OU Campus. Snippets can be placed into any editable region inside OU Campus, and when inserted, the snippet code becomes part of the page's HTML.

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.



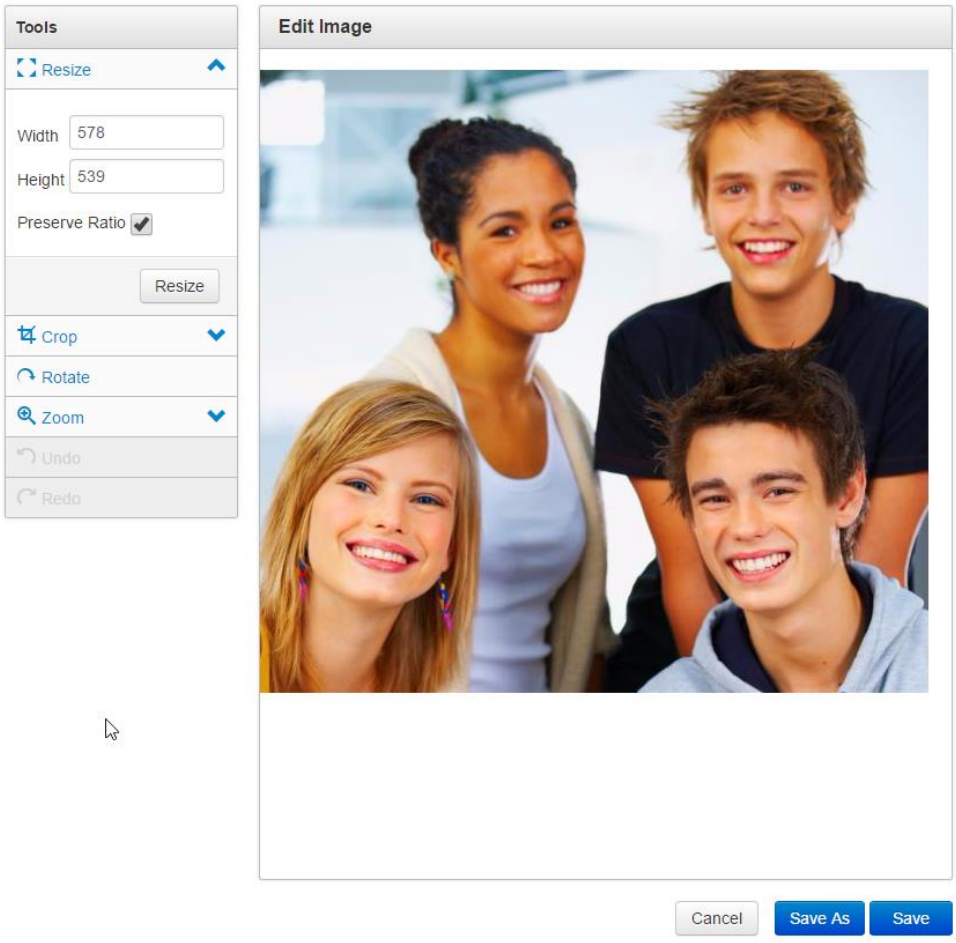
4. Once the Snippet is inserted on the page, edit the content as desired. Click **Save and Exit** to view the snippet on the page. **Note:** Certain snippets will display in a table format in the JustEdit editor to make it easier to format content within them, but will transform into another format in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

Using the Image Editor

OU Campus has a built-in image editor to perform basic functions such as resizing, cropping, and rotating images. You can choose to enter the Image Editor immediately after an image is uploaded, or you can navigate to it at any time by clicking on an image file in the Pages list view through **Content > Pages**.

To use the image editor:

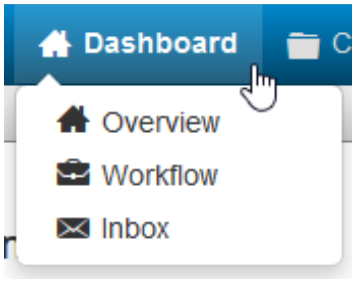
1. Navigate to the Pages list view by selecting **Content > Pages** from the global navigation bar. Hover over an image file and select **Edit** from the Edit menu. Alternatively, clicking on the image's hyperlinked name and selecting **Edit** from the Page Actions toolbar on the resulting screen also opens the Image Editor.
2. Using the tools available in the Tools menu, modify the image as desired.



3. Click **Save** to overwrite the original image, or click **Save As** to save the modified version as a new file. **Note:** Changes to images will need to be published before they will appear on the live production server.

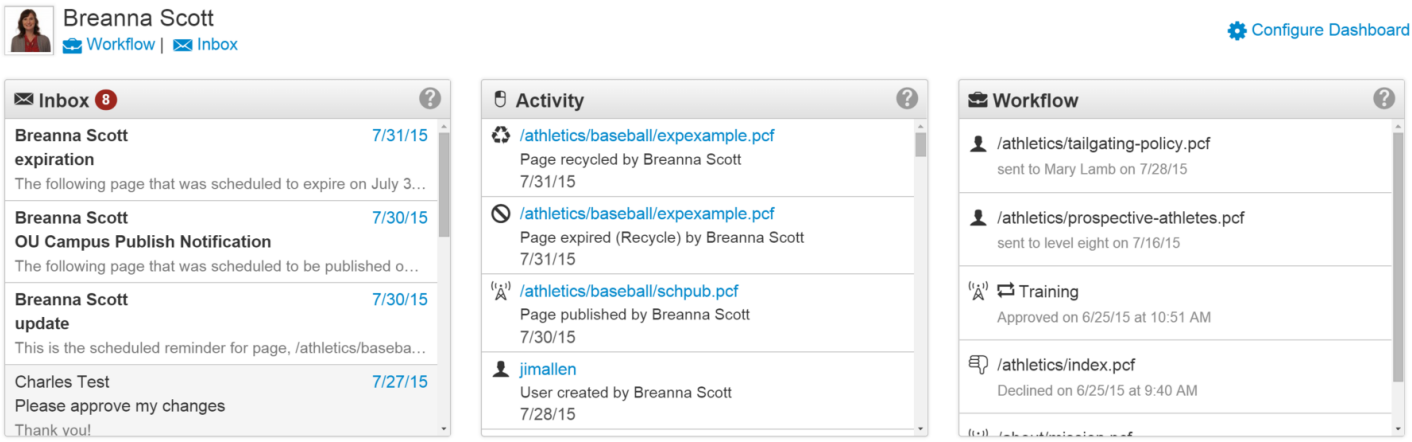
Dashboard

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.



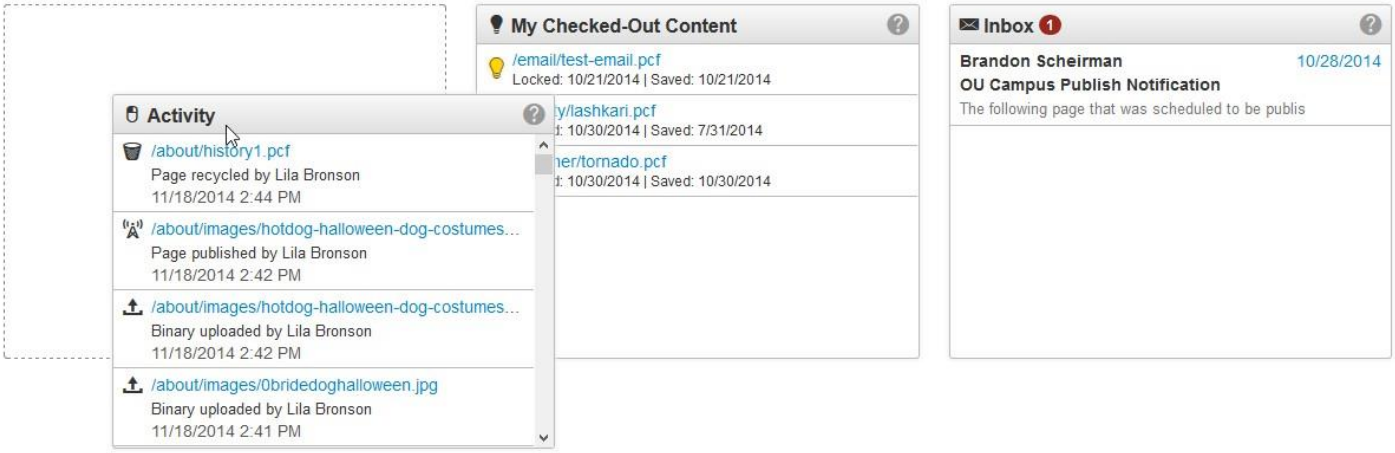
In the Dashboard menu on the global navigation bar, users can find links to Workflow and Inbox. These options are also found beneath the user's name on the Dashboard overview page.

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:

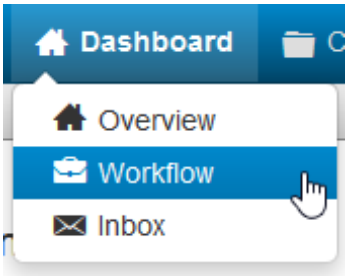
- **Workflow**: The Workflow list view shows content that a user has been sent for approval or content that a user has sent for approval and are separate from other messages, which can be viewed in the Inbox and Sent. Content within an approvals process can be tracked using this screen.
- **Inbox**: 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.

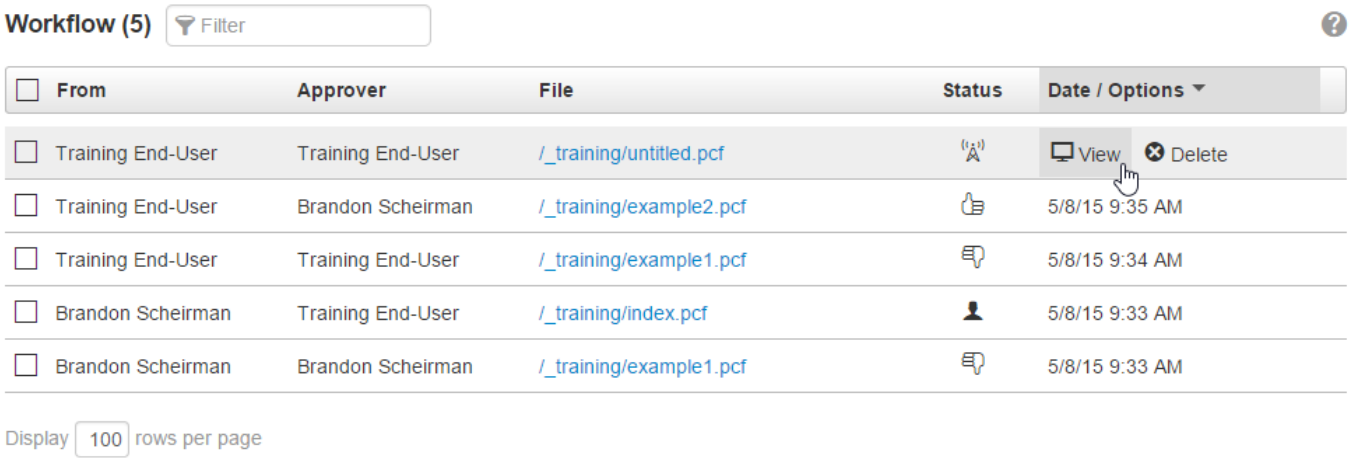


Workflow can be found in the global navigation bar at **Dashboard > Workflow** or by clicking the Workflow link near your name on the Dashboard page.

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.



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 icons shows the Workflow Message.

Status Icon	Description
	Pending Approval (by another user)
	Pending Approval (by the current user)
	Approved and Published
	Declined
	Cancelled from Workflow

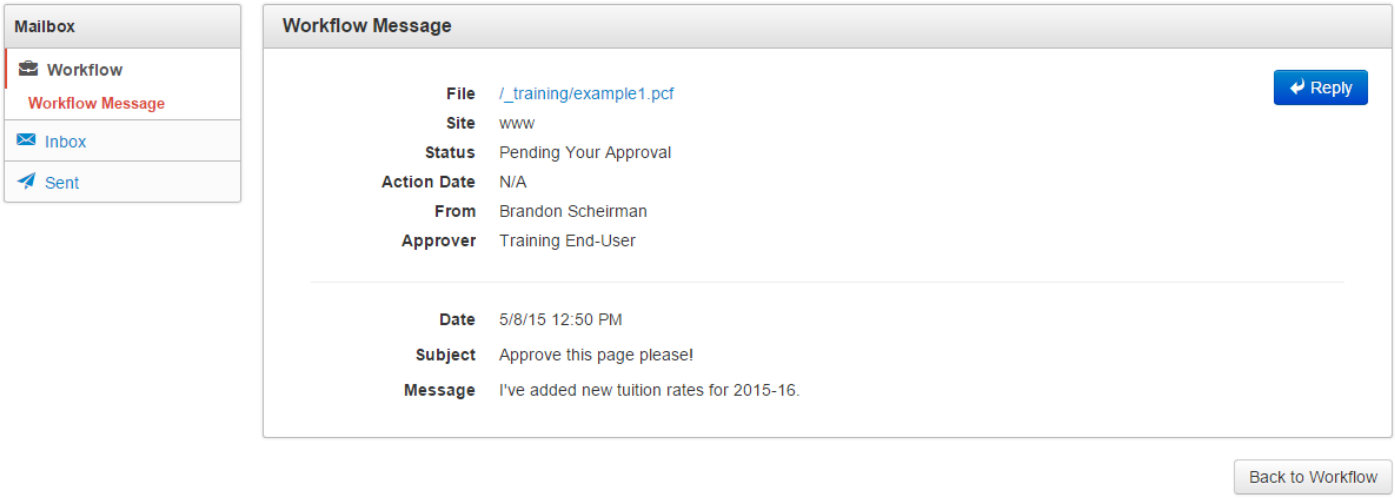
Viewing a Workflow Message

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

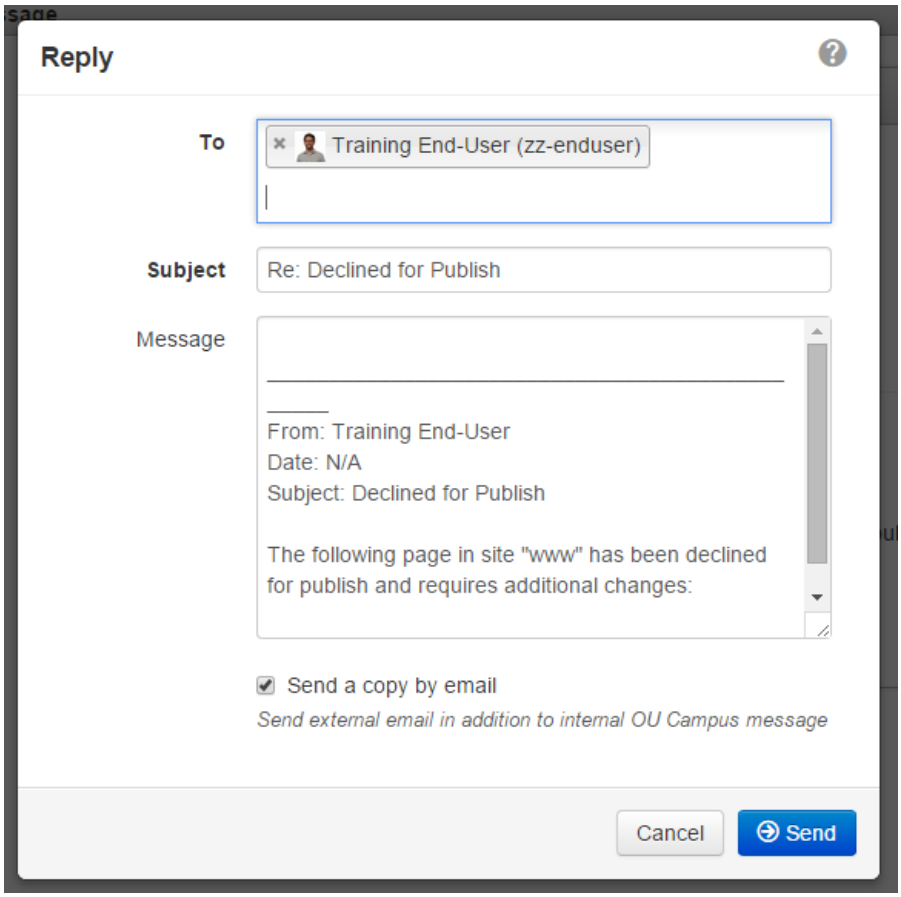
From within the message, users can:

- 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



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.



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.

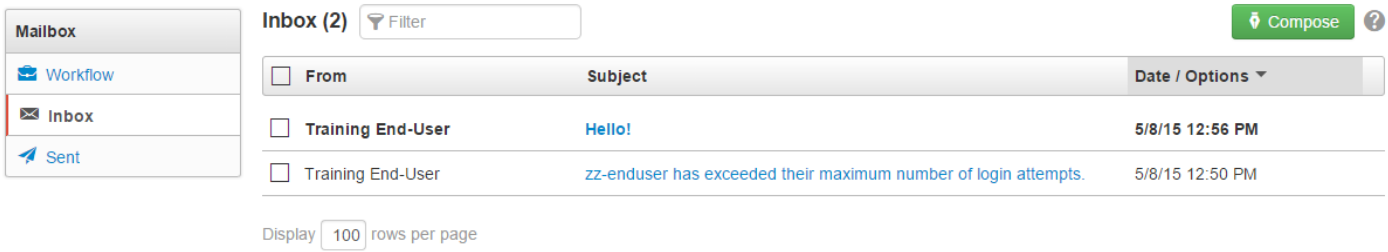
Inbox

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.

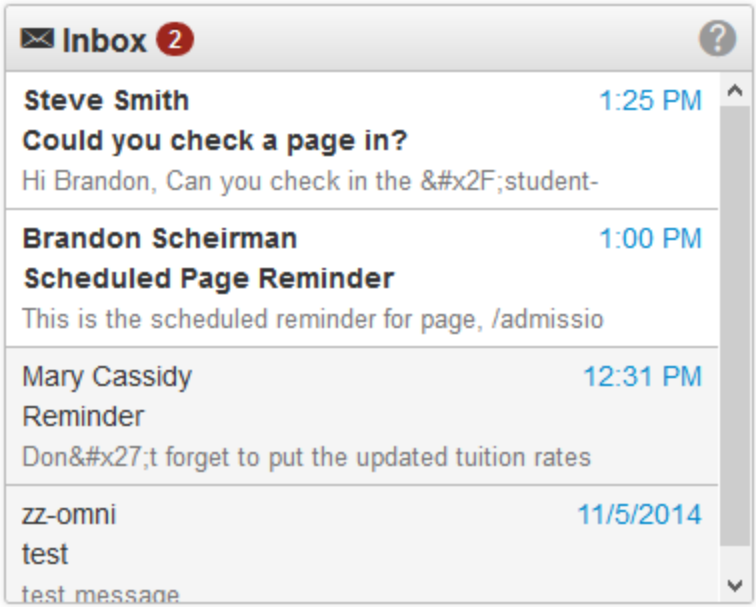
Inbox



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 be 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

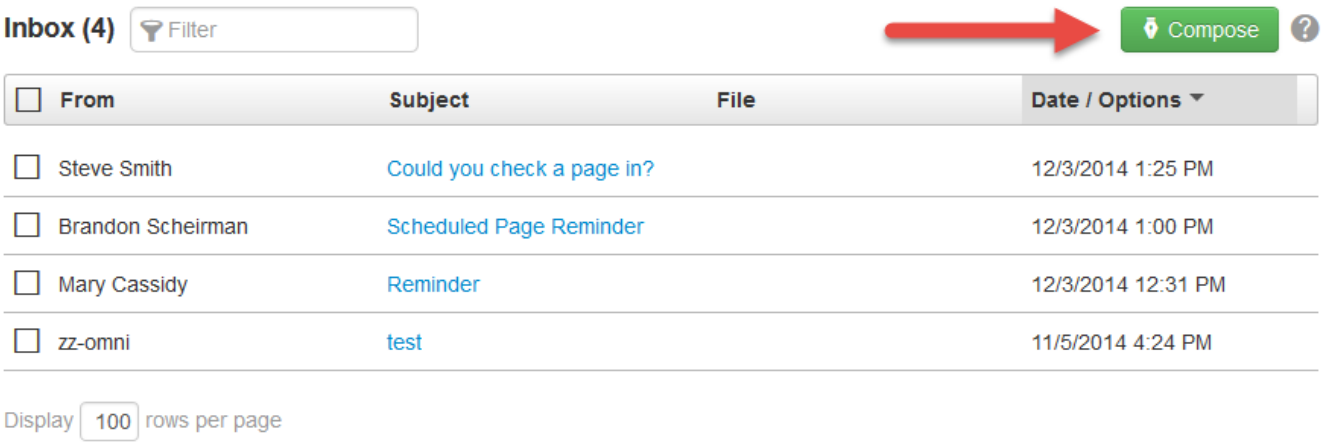


Composing Messages

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.

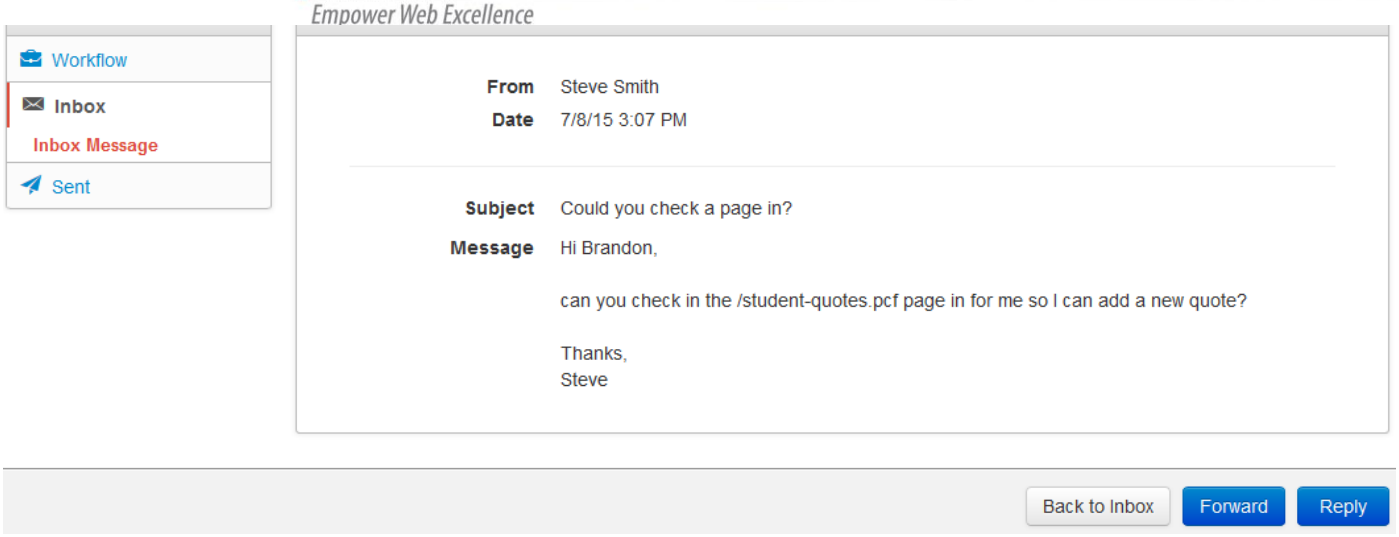


3. A modal will appear. Enter the user to whom the message should be sent in the To field. A user or a group of users may be selected from the drop-down, which appears when the user clicks into the field.
4. Enter a Subject And Message
5. By default, the Send a copy by email checkbox is selected. To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

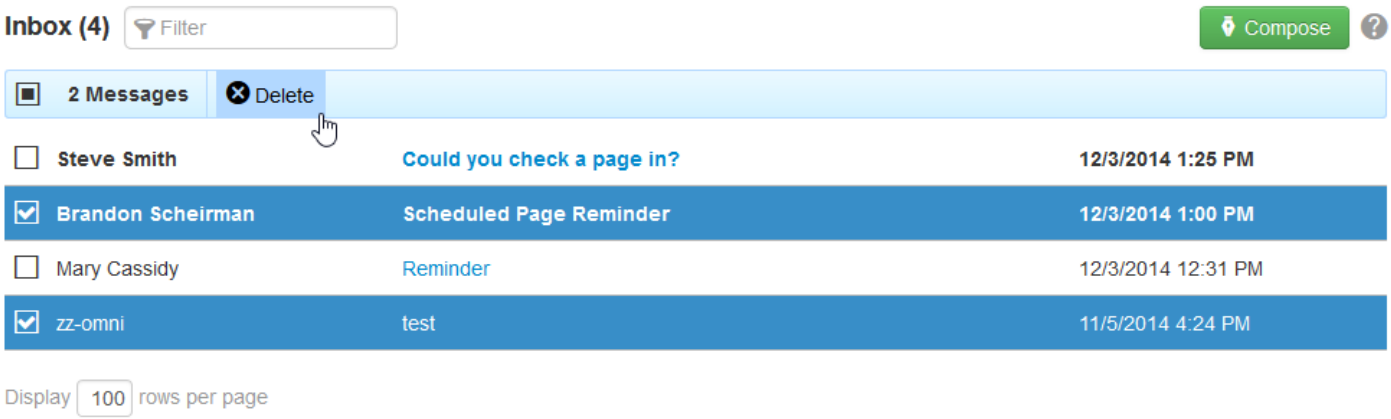
Viewing, Replying to, and Deleting Messages

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.

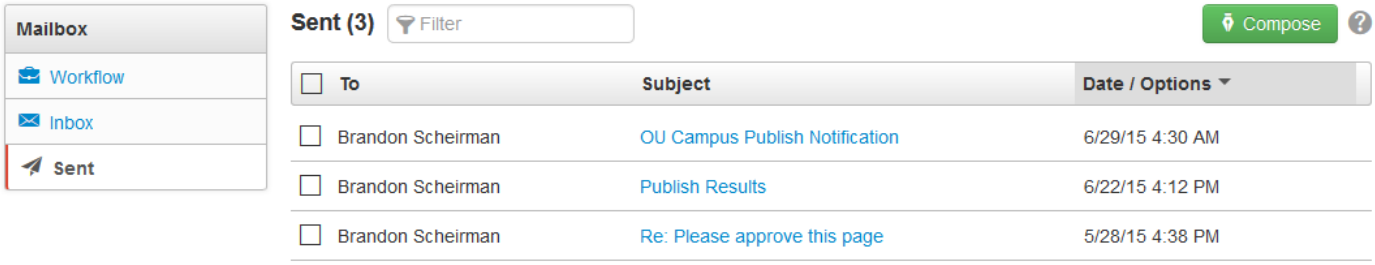


A message may be deleted by hovering over the message row in the Inbox list view and clicking Delete. Multiple messages may be deleted by selecting the checkbox next to each message and clicking the Delete icon that appears in the top row.



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.



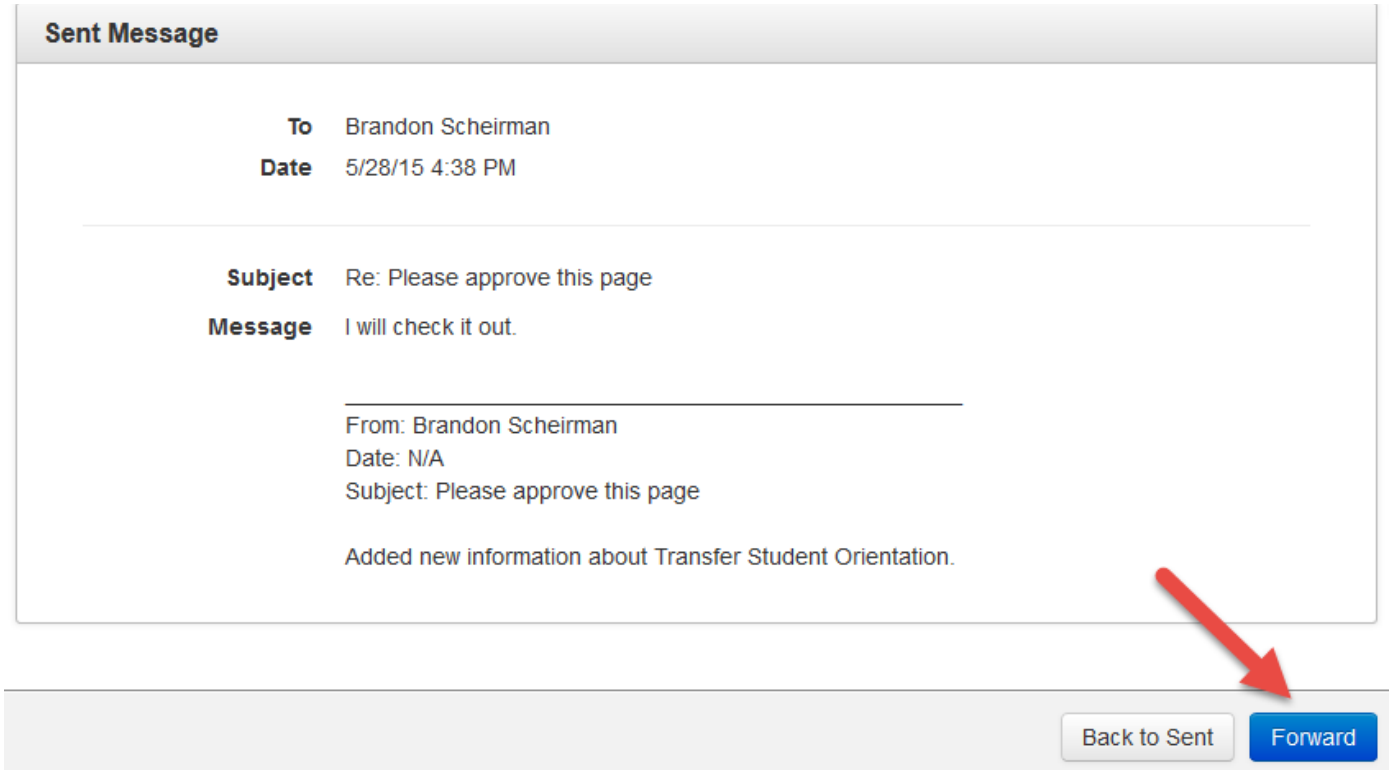
Other functionality available from the Sent screen includes:

- 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.



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**.