CMS 101

Introduction to Ingeniux CMS

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INGENIUX

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Course Prerequisites

This course is designed for those who are new to the Ingeniux environment. To complete this course, you need a working knowledge of the following:

- Navigating on a PC or Mac
- Using a web browser

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Authoring Fundamentals

In this chapter, you'll learn to:

- Access the CMS and navigate the environment.
- Locate pages and work with elements in the Edit Form.
- Perform common tasks in the Body Copy Editor.
- Upload and update documents to the CMS.
- Edit, preview and save changes to pages.
- Advance pages in workflow.

Getting Started with Ingeniux CMS

Ingeniux CMS provides the tools needed to create, update, publish and manage web pages. Users access the CMS via the CMS client, which can display all options and commands available in the CMS or a predefined subset of options. The options and commands displayed depend upon the permissions that have been set for the user accessing the client.
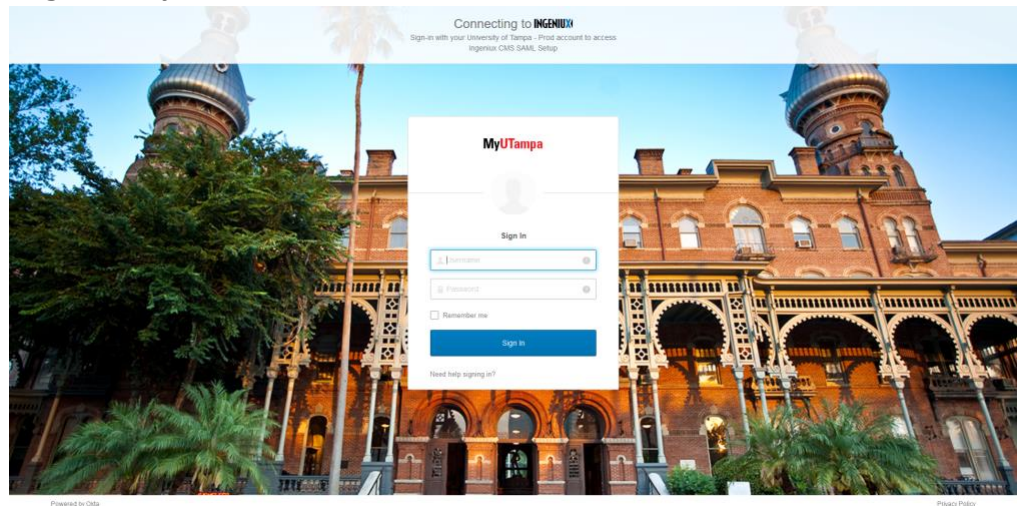
The CMS client works on both PC and Mac operating systems and runs best on Google Chrome.

✓ Refer to online product documentation for supported platform and browser versions.

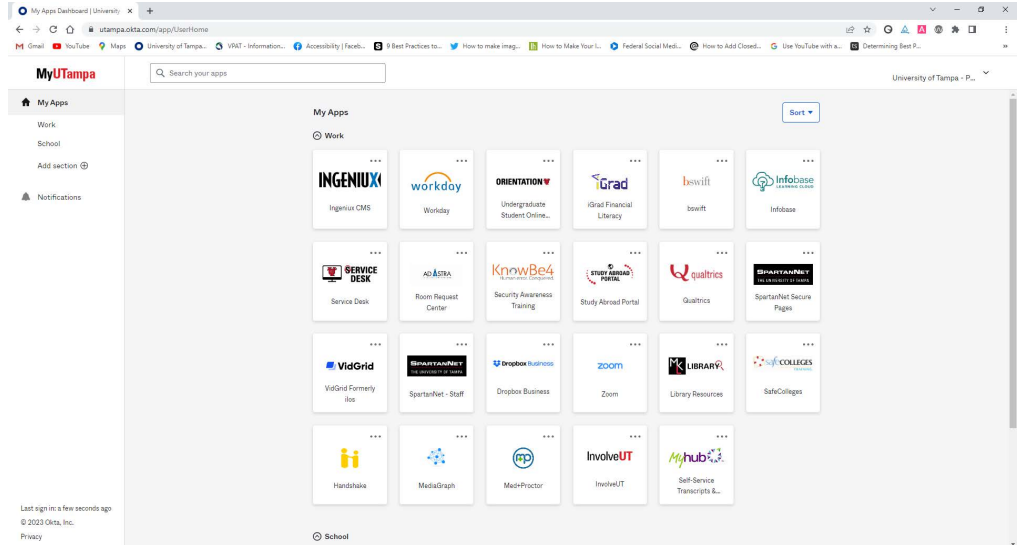## Accessing Ingeniux CMS

To access Ingeniux CMS:

1. Open a web browser.

2. Login to MyUTampa: https://www.ut.edu/MyUTampa
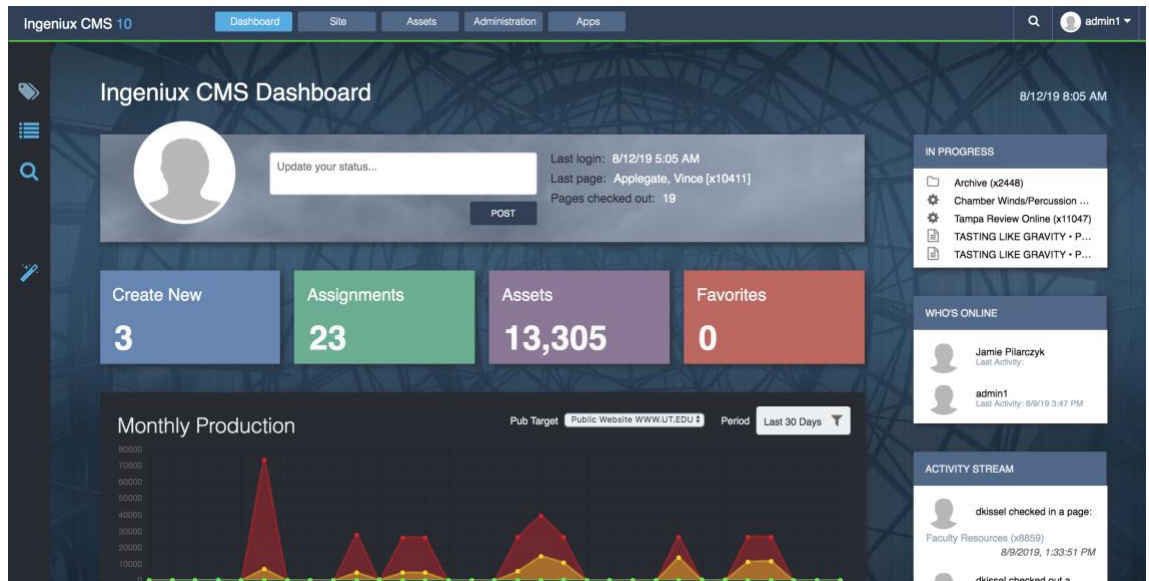
3. Login with your credentials.

4. Select Ingeniux CMS from the menu.

5. Select Okta from the dropdown and click Login.

Examining the Dashboard

When you first access the CMS, the Dashboard tab appears in the Workspace. This view provides a brief snapshot of content management and system information. It can be accessed at any time from the first button on the application navigation bar.

Editing Content

There are three basic types of content items that you will use to create a fully functional product (such as a website) from the CMS: pages, components (separate related content that is attached to your page) and assets (PDF documents and images). Pages and components are created in the **site tree**, while assets are created in the **assets tree**.

Pages and Connected Components

**Pages** are shown with the ☐ paper icon on the site tree.

Components are shown with the ⚙ gear icon on the site tree. Components can be embedded (located within a page's template) or unembedded (located independent of a particular page and able to be attached to multiple pages.)

For an embedded component, choose the page icon to edit. For an unembedded component and choose the gear icon or page name in the site tree to edit. If the component has multiple items within in, you might need to click the dropdown arrow to access the particular component you need to edit. Once you find the component, click "Go To." ***Important: Unembedded components may be connected to more than one page, so be mindful of updating this, as they may update on several pages.***
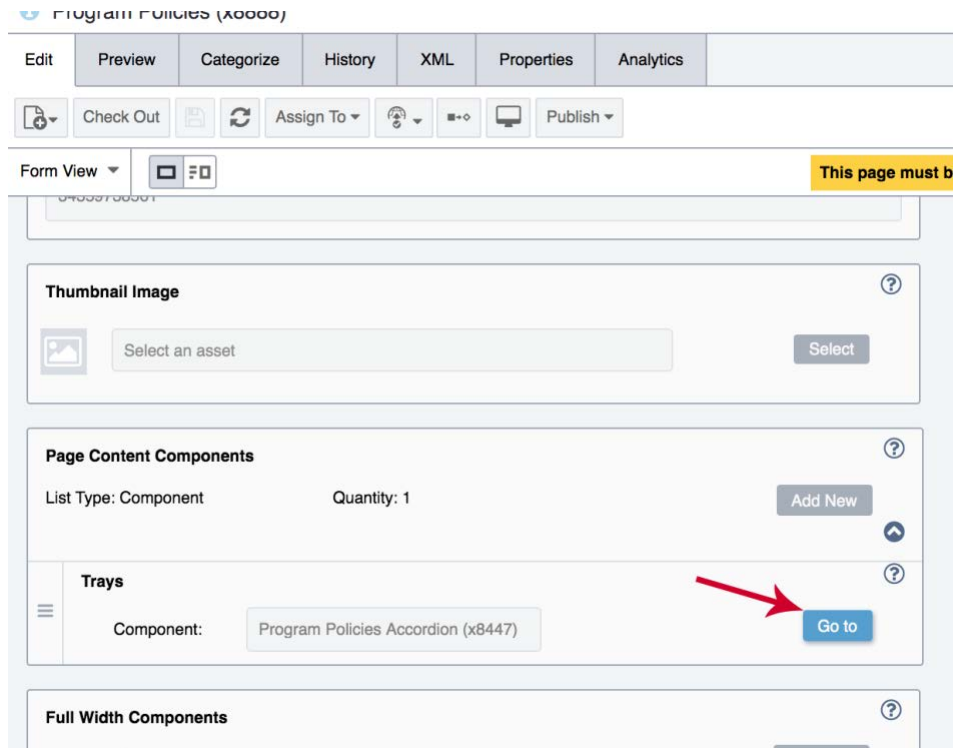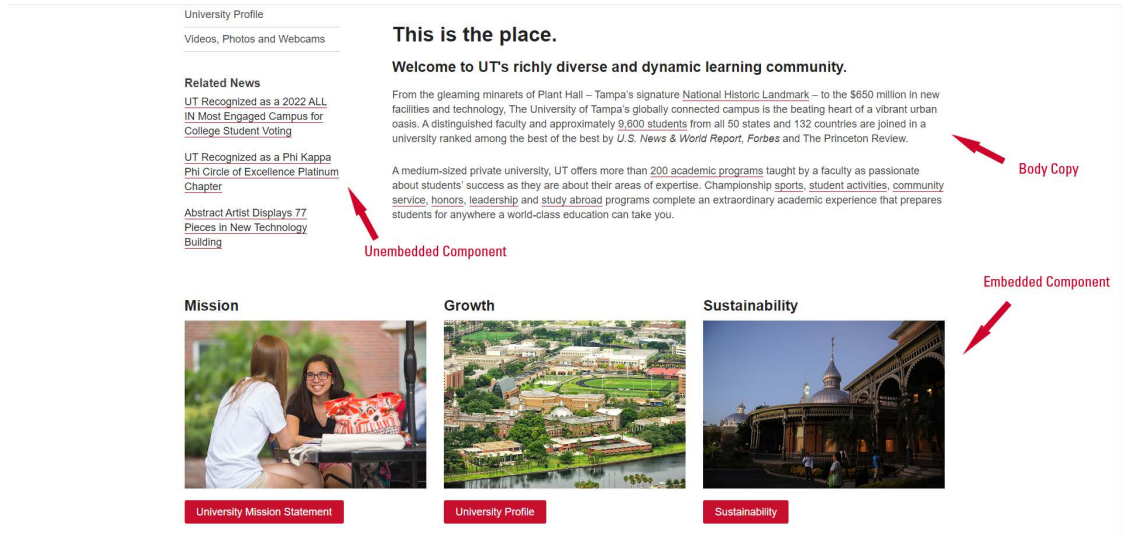
An example of an unembedded component is an accordion page:
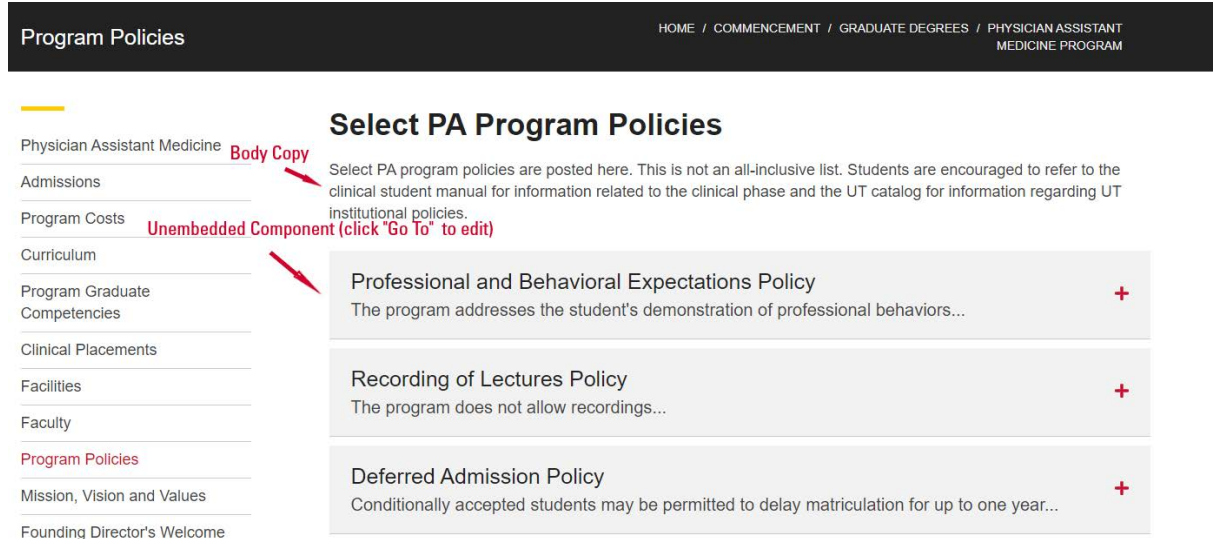
Additional Example of Components:

Using the Edit Tab

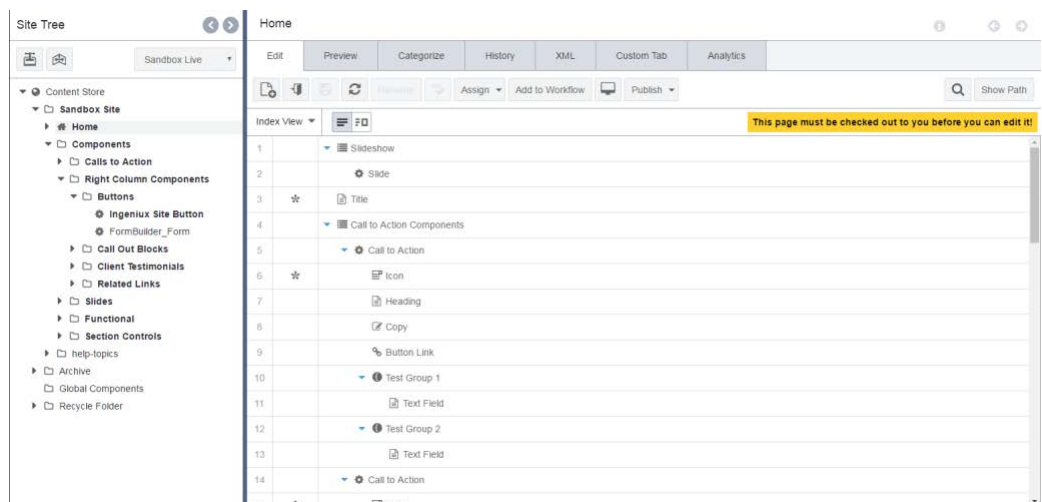The edit tab displays possible content available for use on the page.

Figure 1: The Edit Form in Ingeniux CMS.

Editing a Page

To work on a page that is published, you will need to use assign it to yourself, edit and then advance in workflow. Click the workflow button in the toolbar to bring up the advance in workflow button.

To edit a page:

1. Find your page using **Search** or **Site Tree**.
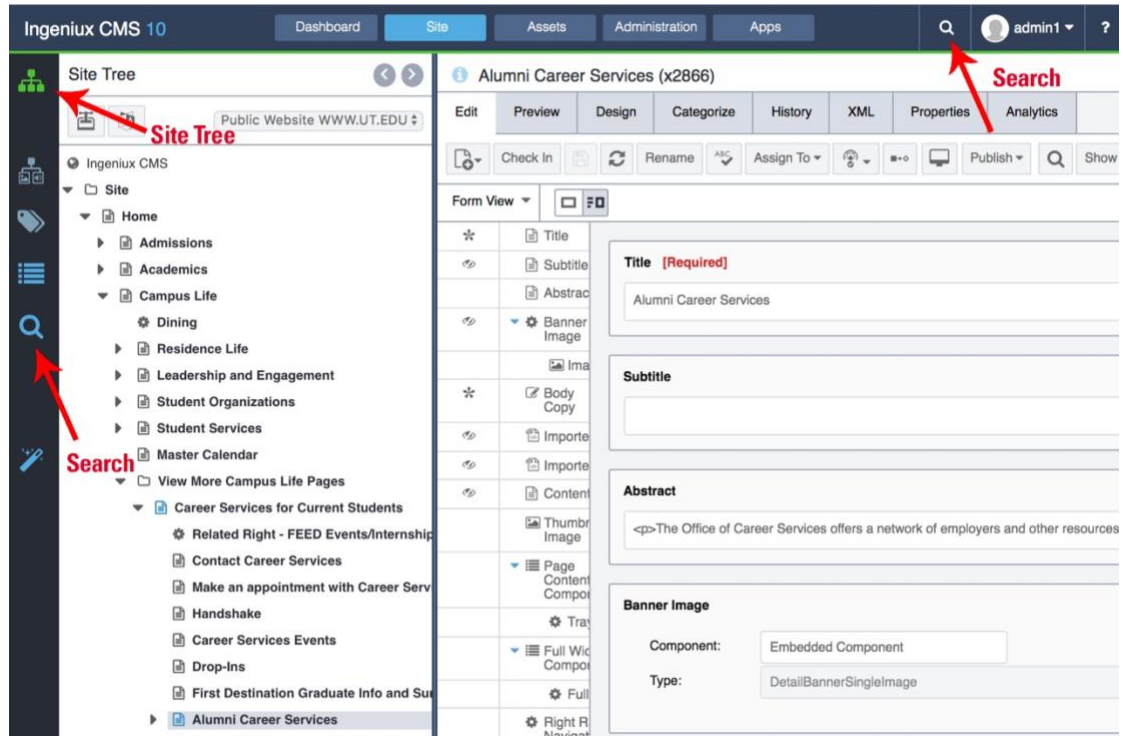
2. Click the "i" information icon to check the status of the page.

   If it assigned to a person, instead of web authors, contact the person to verify they are not *currently* authoring the page. You do **not** want to take it away from someone else while they are working on it.

Visit UT (x3525)

General Properties

ID	x3525
Schema	Detail
Assigned to	👥 Web Authors
Checked out	Yes
Locale	
Created	5/15/2019, 6:19:04 AM
Last changed	7/2/2019, 6:52:14 PM
Changed by	admin1
Workflow	Supervisor Workflow -> Authoring
Comment	Existing content item added to workflow

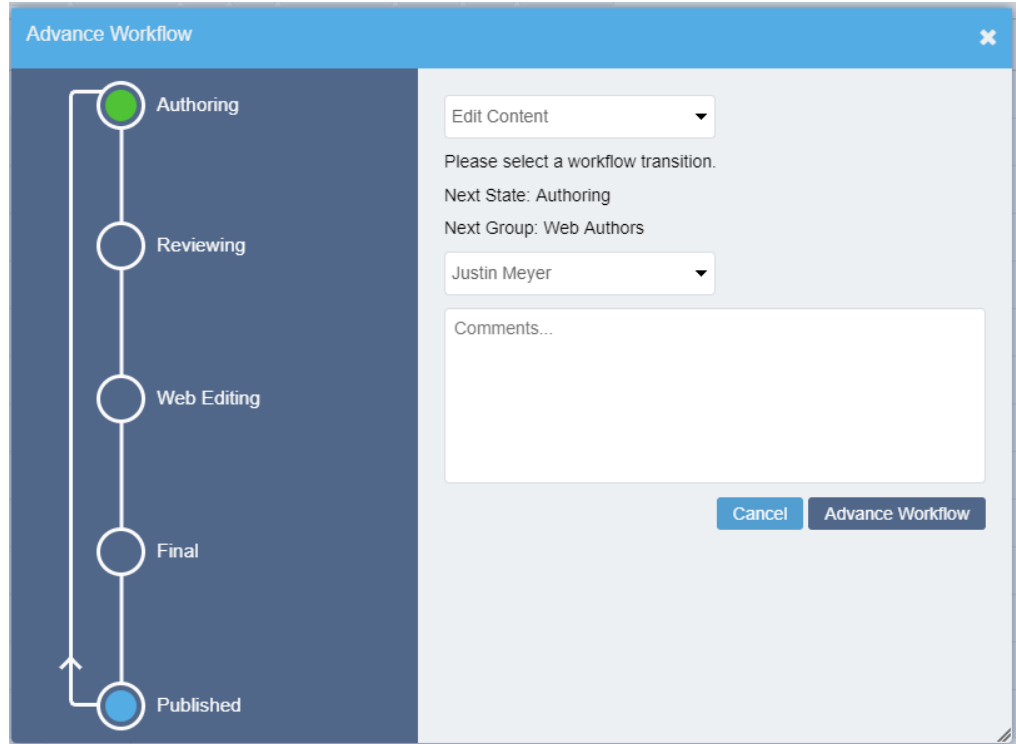3. Click **Assign To** and choose **Me**.
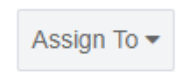
4. Click the **Advance in Workflow** button on the toolbar and the advance page in workflow dialog appears. It is the icon that is a square pointing to a diamond.
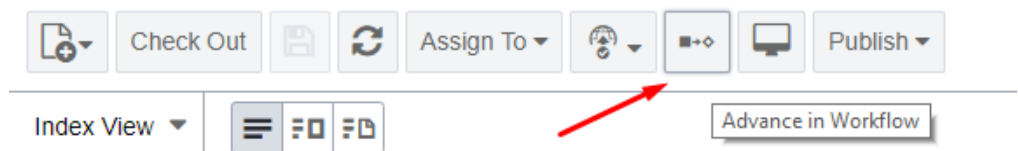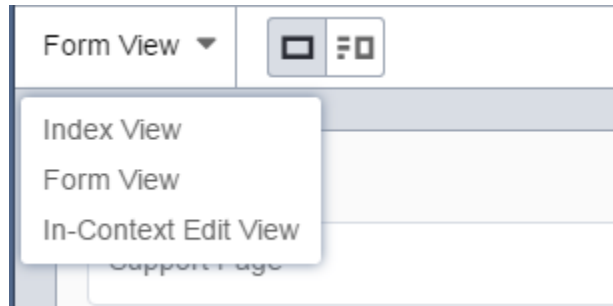

Figure 2: The Advance Page in Workflow dialog.

5. Select **Edit Content** and then choose **your name** from the dropdown.

6. Click **Advance Workflow**. Now, the yellow error should be gone.

7. To view the body copy to edit, choose **Form View**.

8. Find the **body copy** field and edit the page content within it.

Body copy can be expanded using the arrow on the lower right corner of the box.

Help text is in the upper-right corner of each field, which can be accessed by hovering your cursor over the encircled question mark.

In-Context Edit View

On pages with ICE (In-Context Editing) enabled, you can enter In-Context Edit view. This view allows editing through the preview of a page.
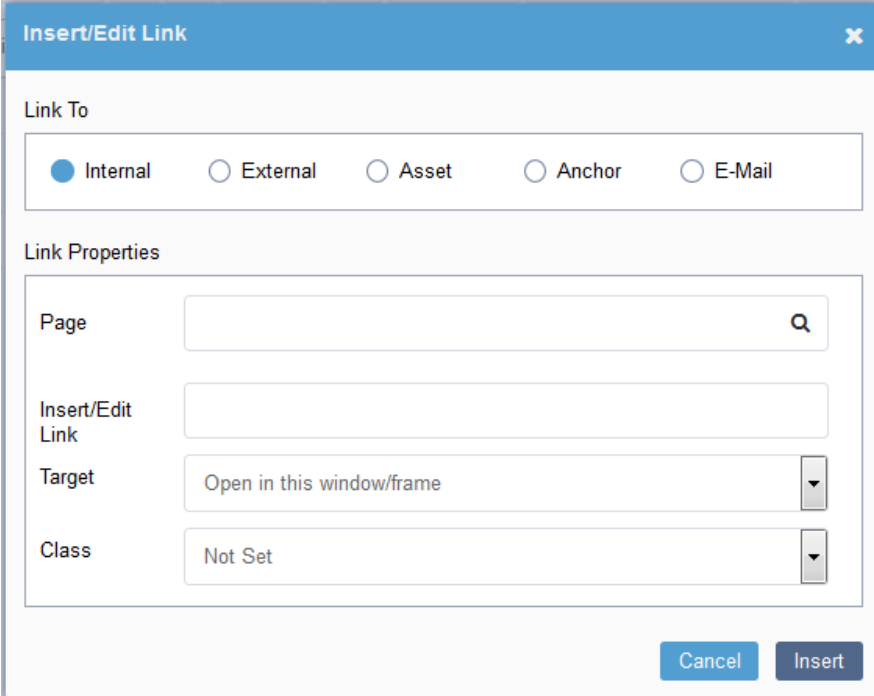
✓ This has not been implemented yet, but will be a new feature coming soon.

Adding a Hyperlink to a UT Page or External Page

In the Ingeniux CMS environment, links to other pages within the site are considered *internal links*. Internal links rely on the xID of the page to which the link points. By relying on this unique page identifier, the link will retain its integrity even if the page is moved elsewhere in the site or renamed.

To link to an internal page:

1. Select the text to be hyperlinked in the body copy editor.

2. Choose ⚭ the **Insert/Edit Link** icon, and the dialog box opens.

Figure 3: Inserting an internal link in the Body Copy Editor field.

3. Type the first few letters of the desired page name in the page field and select the desired page from the list.
   -Or-
   Enter the xID for the page to which the link will point.

4. Specify a title, target and class, if desired.
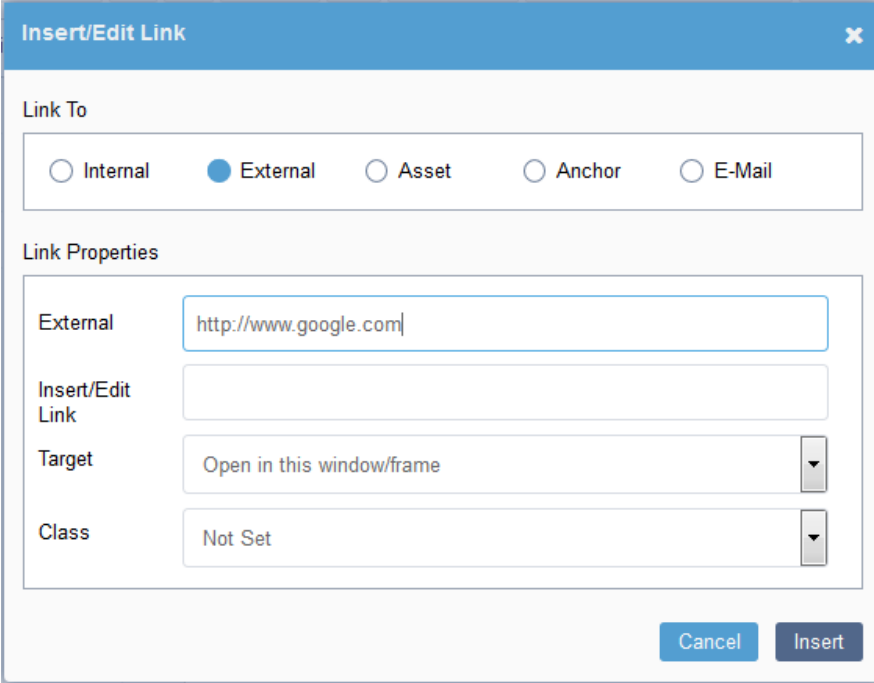
5. Choose **Insert**.

Adding a Hyperlink to an External Page

In the Ingeniux environment, links to pages outside the site are considered *external links*. When you create an external link, it's important to test the link to ensure accuracy.

To link to an external page:

1. Select the text to be hyperlinked in the body copy editor.

2. Select 🔗 the **Insert/Edit Link** icon, and the dialog box opens.

3. Choose **External**.

Figure 4: Inserting an external link in the Body Copy Editor field.

4. Type the URL for the desired page in the external field.

5. [Optional] Specify a target, title and class.

6. Choose **Insert**.

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Finishing a Page

Once you have finished editing content, it's usually a good idea to spell-check, then save the page. It's also a good idea to preview the page to see how the HTML will display in a browser.

Checking Spelling

The Ingeniux CMS employs an open-source spell-check system called NHunspell. It features customizable OpenOffice dictionaries, and many specialty dictionaries (such as medical and legal dictionaries) are also available for free in a variety of languages.

To spell-check a page:

1. Open the edit form for the page to be reviewed, if not already open.

2. Click **Spell-check** on the toolbar. In all spell-check–enabled fields (text or HTML), red lines appear beneath misspelled words.
    For each misspelled word, there are options to:

    - Replace the word.

    - Add the word to the dictionary.

    - Ignore the word.

    - Ignore all instances of the word.

3. Move to the next or previous misspelled word.

4. Select an option from the drop-down and repeat for each misspelling. Click **Cancel Spell-check** to stop before it completes all fields.
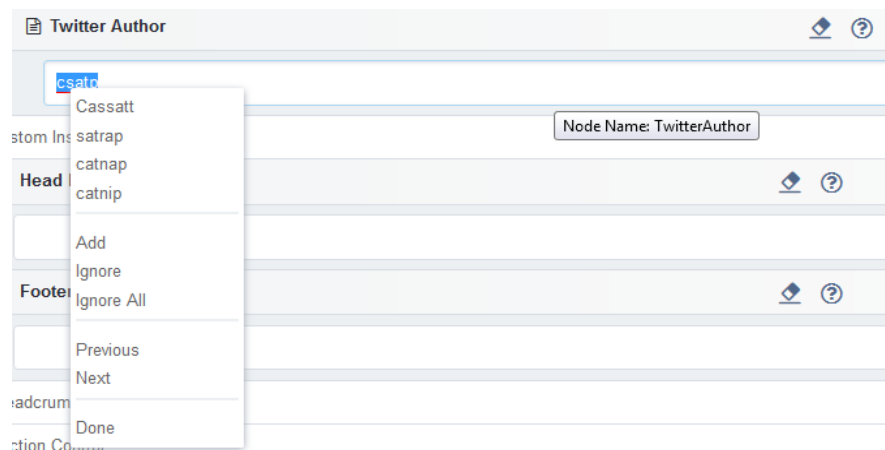
Figure 5: Checking spelling within the Edit Form.

5. When you finish spell-checking, click **Done** on the drop-down menu.

Saving a Page

A page can be saved at any time. Saving changes does not cause the changes to appear on the published site. Rather, the changes are saved to a version of the page on the site's database.

If there are pending changes that have not been saved, an asterisk appears in the title bar next to the page name. The Save button on the toolbar is only available when there are pending changes yet unsaved.

To save a page, click **Save** 💾 . Pressing CTRL + S also saves the page.

✓ The page auto saves, as well. Auto save is turned on by default in the CMS, so clicking away from an edited piece of content to any other location, even closing the window, saves the content.

Previewing a Page

The **Preview** tab provides a rendering of the current page as it will look when published. This view is completely functional, with all navigation and links appearing and working as they will when the page and its dependencies are published to the live site.

✓ Clicking the **Preview** tab automatically saves the page. In addition to the preview tab, there is a separate preview window. This window provides additional options for configuring the preview to reflect realistic content that doesn't execute in a runtime environment.

To access external preview, click **Preview** on the toolbar, or right-click on a page in the site tree and select **Preview**.
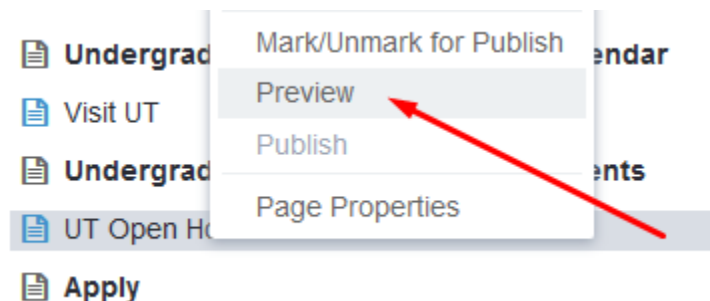
Advancing Pages/Submitting in Workflow

The last step in authoring is to *advance* the page. This means sending a page to the next work state, or stage in a workflow, and the user or group associated with that work state.

✓ Workflows are configured to be a full circle from editing, sending for review, to publishing and then back to editing.

Advancing a Page

After you have completed all your tasks in a page or component, you can send the content for approval through the workflow process by clicking the workflow button on the toolbar. Depending on your workflow, this may send it off to your supervisor or it may go directly to the Office of Public Information.
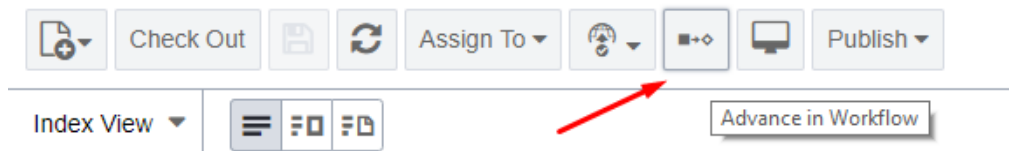
To advance a page:

1. Click the **Advance in Workflow** button on the toolbar and the **Advance Page in Workflow** dialog appears. Do **not** change the dropdowns here. The system has been set up to know who to send it to next.
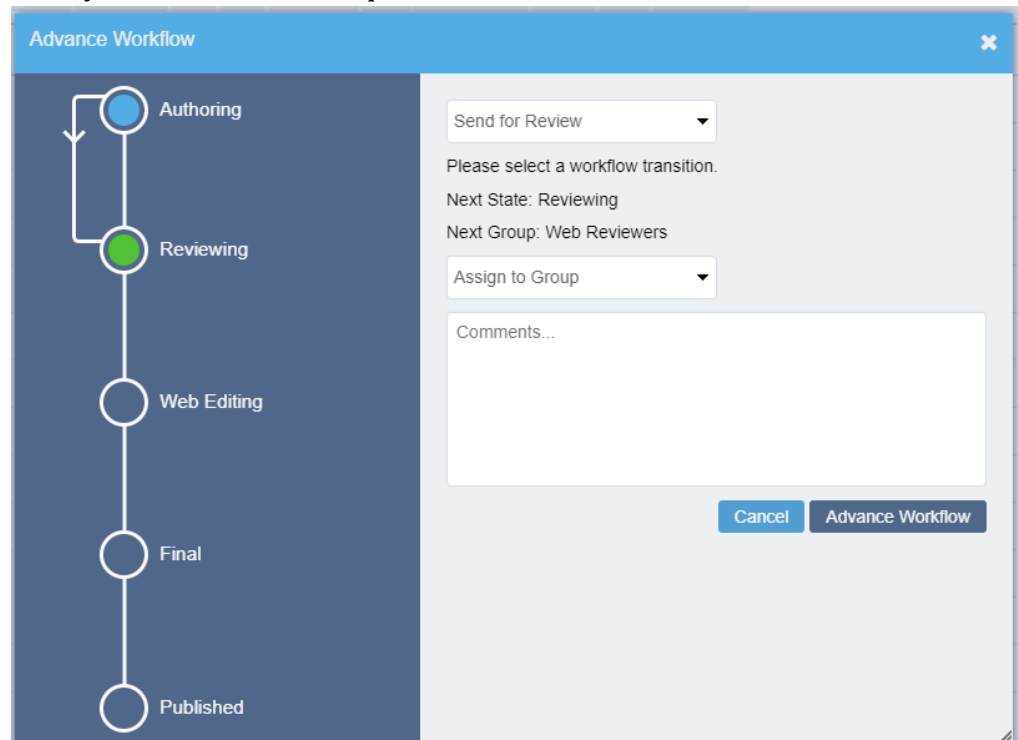
2. Enter specific comments, including instructions on what exact edits you made to the page. If the edits are substantial, you can just say you made edits to most of the page. If you made just one edit, please specify where on the page the edit was made. For example, the third paragraph of the fifth accordion.
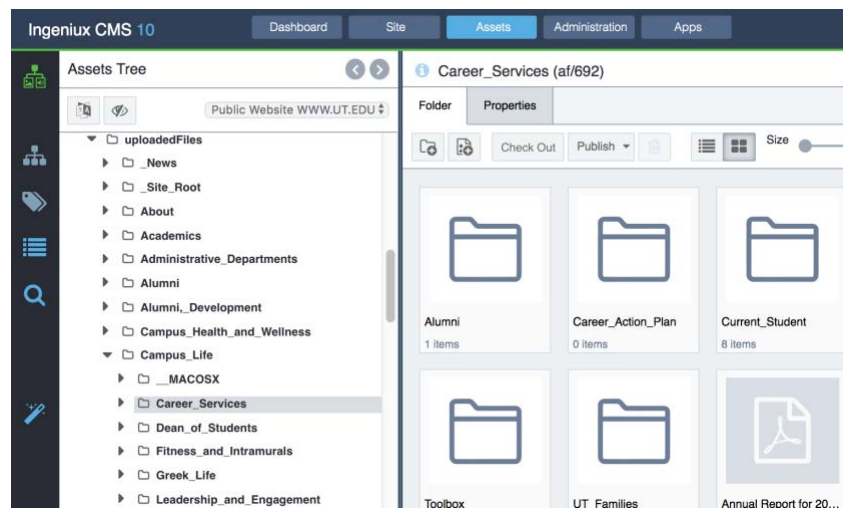
3. Click **Advance Workflow**.

PDF Documents

You can upload documents as assets to use in links on the page and in body copy fields. These assets have their own workflow to support accessibility review.

Adding a New PDF to a Page

To upload an asset from an open asset folder:

1. Navigate to the **Asset** section of the CMS. This is a button at the top of the portal.

2. Click on the **Asset Tree** on the left menu. Find and open your **Department Folder** and click the **Create new Asset** button, or right click the folder in the Assets Tree and select New > Asset.

3. **Rename the file** on your computer, so that it does **NOT** include spaces, dates or version numbers. Uploading a document to the system creates a URL from the original filename uploaded.

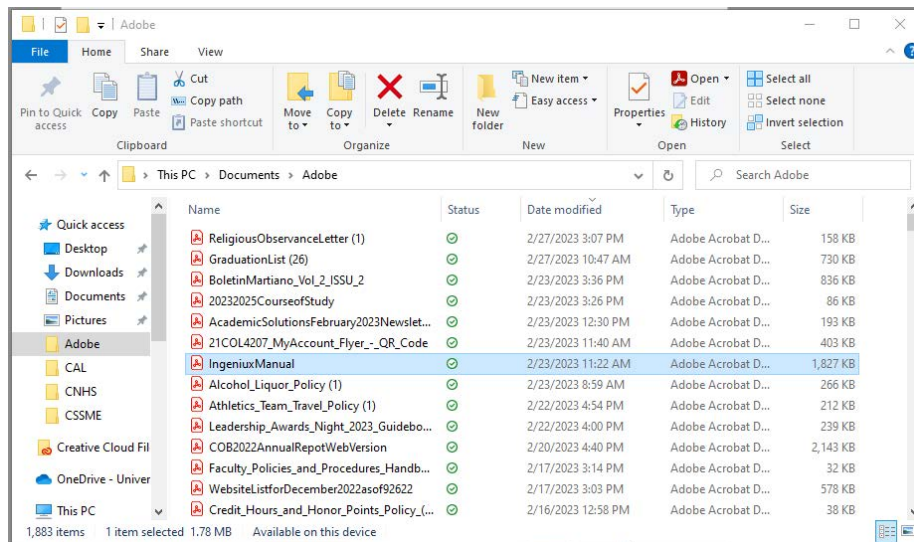   A good example of a filename is: **ResumeWritingGuide.pdf**
   The file will show upload as the following URL:
   http://www.ut.edu/uploadedFiles/Campus_Life/Career_Services/Toolbox/ResumeWritingGuide.pdf
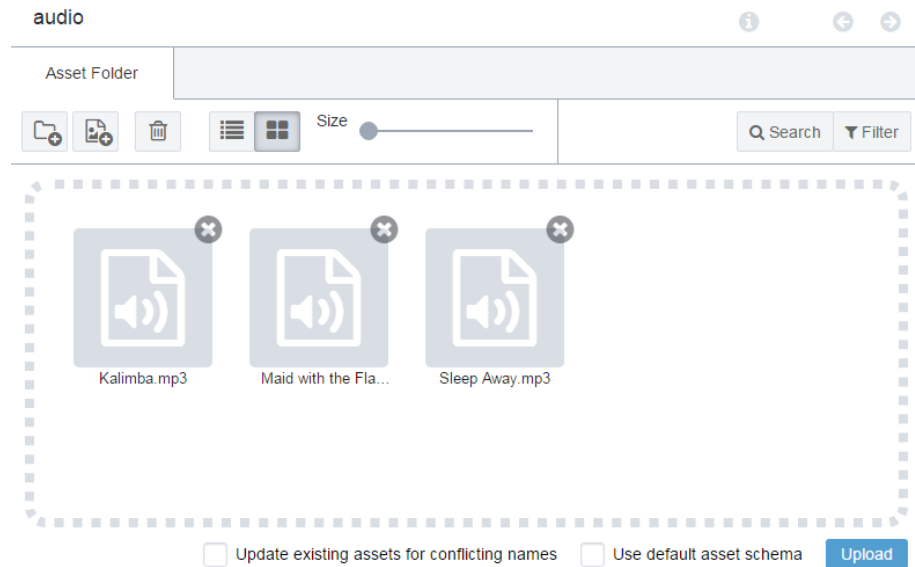
4. Drag the file from your computer onto the ☁icon.
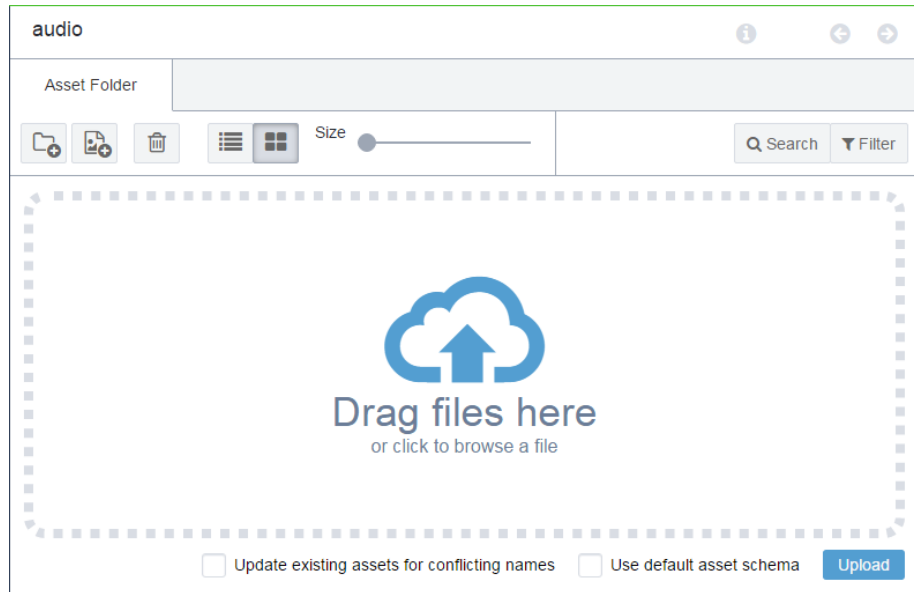
Or click the icon to open an explorer window, select the files you want to upload and click **Open**.

5. You can add multiple files at the same time. Once the files are in the upload window, click the **Upload** button.


6. Check the small box for **Update existing assets for conflicting names** to upload the assets as new versions of existing assets with matching names.

7. Check the box for **Use Default asset schema** to auto-select the main schema for the file type you are uploading, otherwise you will have to select from the possible types and re-attempt upload.

8. Progress bars appear above the assets as they upload.
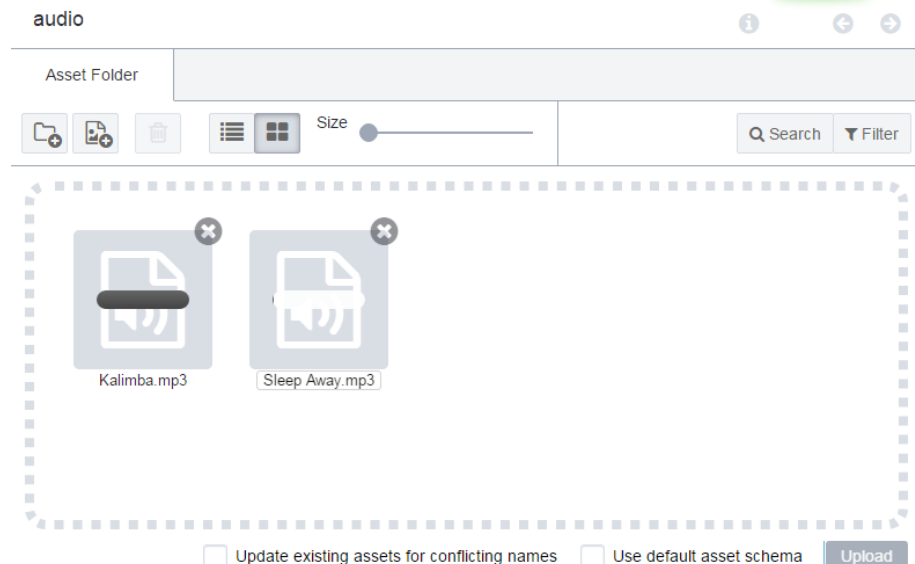
9. Once an asset is successfully uploaded a checkmark appears above it, and it is removed from the list. After all files are uploaded, the upload dialog closes, and you can see your assets in the folder view.

10. Link to your new asset on a page or component, and test that it is functioning as desired.

11. Advance the asset through workflow using the **Advance** button in the toolbar.
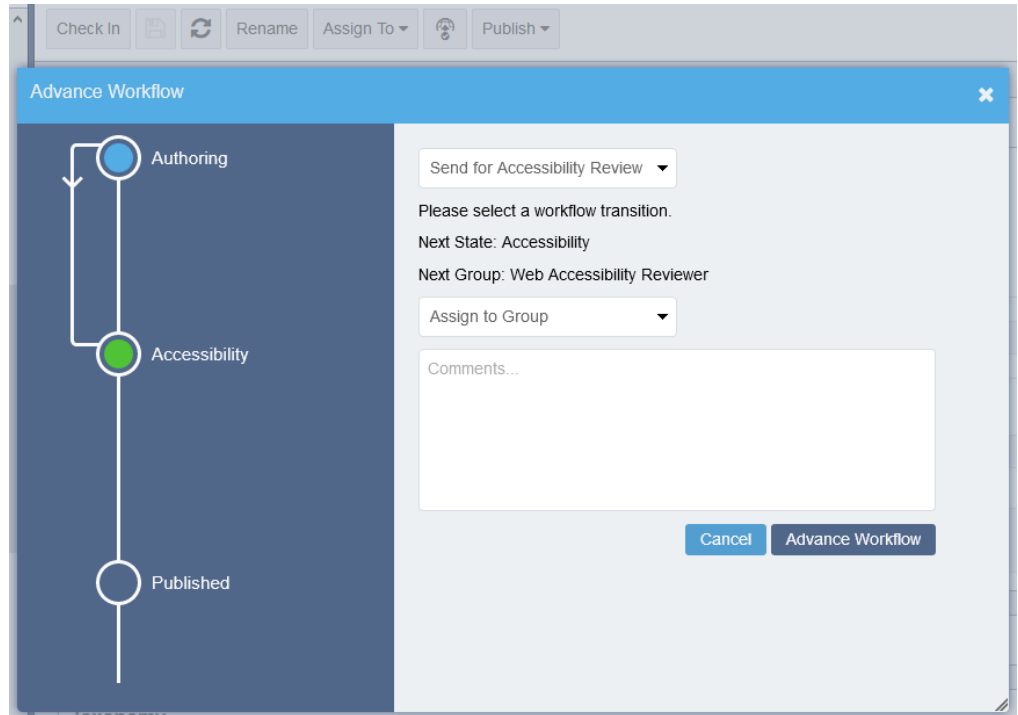
12. Now that the document has been advanced through workflow, head back to the "Site" tab at the top and navigate to the page you would like the PDF link on. You can search for the page in multiple places through

Search or the **Site Tree**.

13. Select the text to be hyperlinked in the **Body Copy Editor**.
    (Select from right to left to avoid selecting the blank space at the end of
    the word or phrase.)

14. Click [icon] the **Insert/Edit Link** icon and the dialog box opens.

15. Select **Asset**.

16. Click the **Browse** icon. The **Select an Asset** dialog appears.
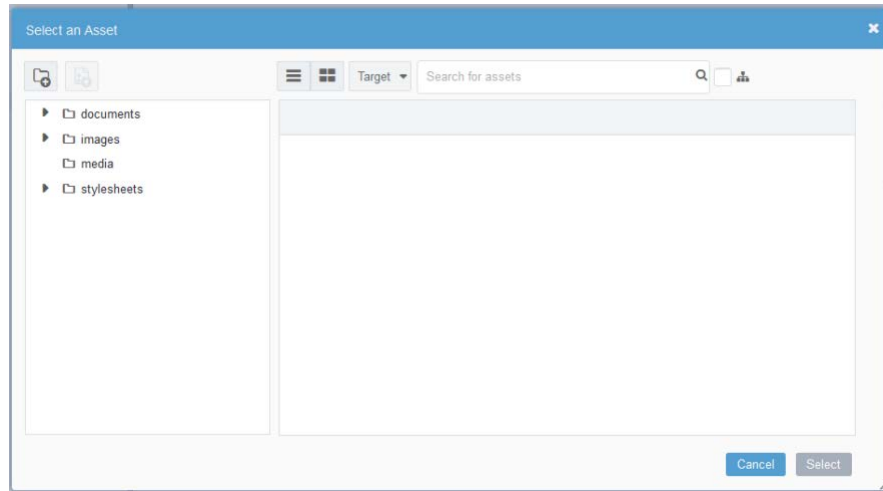
Figure 8: Selecting an asset in the Asset Manager.

17. Use the folder structure on the left to navigate to the file you want to link.
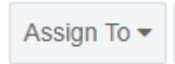   -Or-

    If the file hasn't been uploaded, choose **Upload** .

18. Select the file and click **Select**.

19. [Optional] Specify a title, target and class.

Choose Insert**.**

To Update or Overwrite an Existing Asset:

1. Open the asset area of the CMS and navigate to the desired asset.

2. Double click the asset to open it.
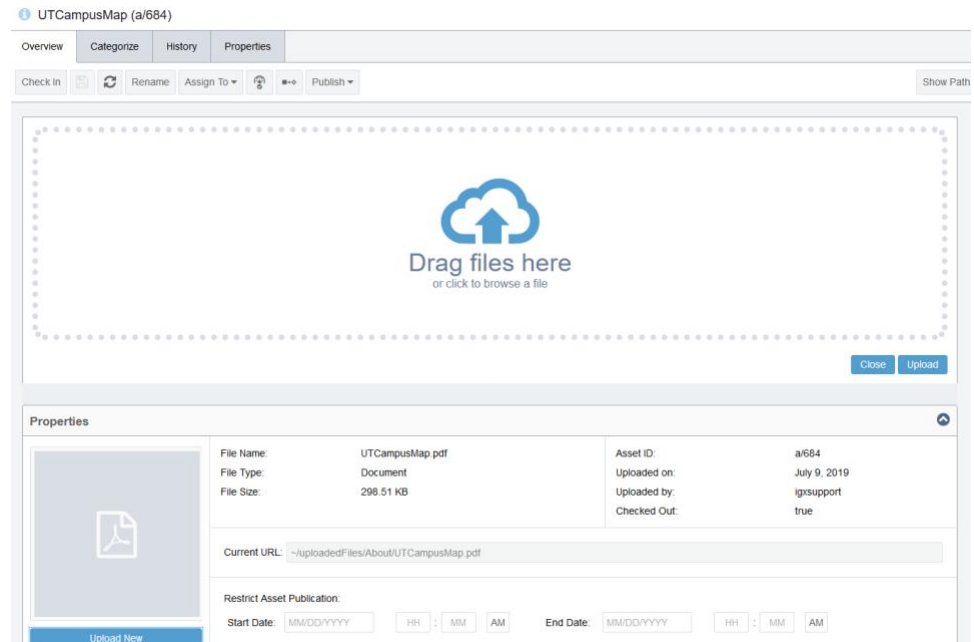
3. Click **Assign To** and choose **Me**.

4. Click the **Advance in Workflow** button and select Edit Asset. Choose **yourself** from the list of users to bring it to yourself for edits. Then click **Advance Workflow**.
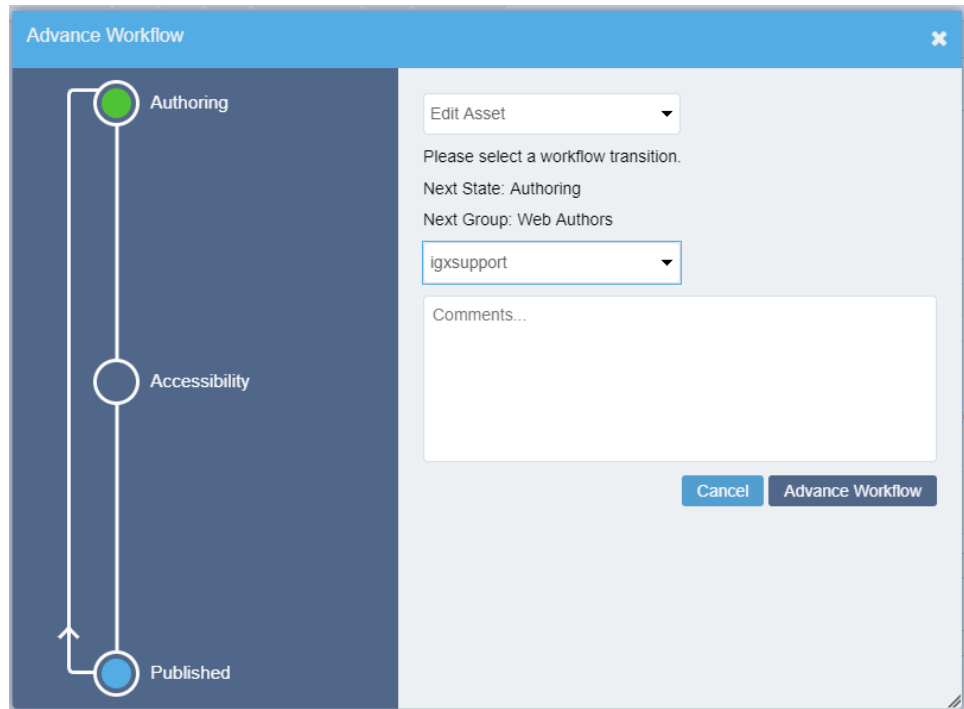
5. **Upload New** has now changed to blue and is now clickable. Click on it to begin overwriting the document. The upload menu pulls down from the

top.

6. Drag and drop a new file, or click to browse for a file from your computer.

7. Click **Upload**.

8. Once an asset is successfully uploaded a checkmark appears above it.

9. Locate a page or component that is linking to your asset, and test to see that the new asset is appearing.

10. Advance the asset through workflow using the **Advance in Workflow** square-to-diamond icon in the toolbar and then select the **Advance**

Workflow button.
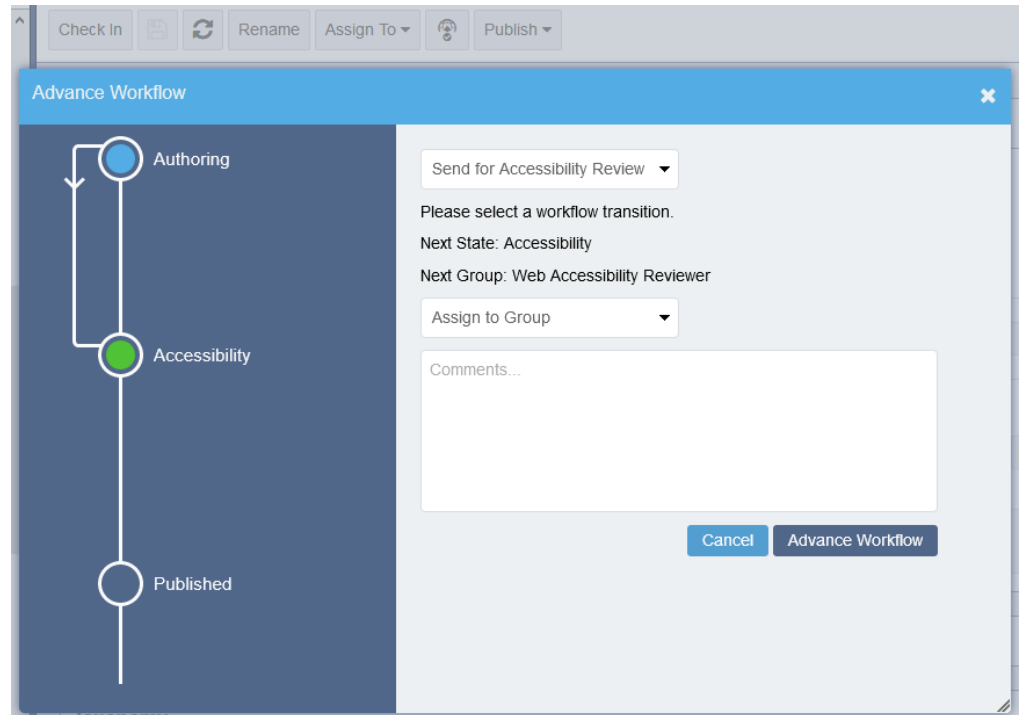
11. Your file will go live once the system does a full publish, which is set hourly.

List of Elements and Help Icons

The table below provides a list of elements that are currently available for use in the CMS.

	Icon	Type	Description
Text		Plain Text	Contains only unformatted text. The Plain Text element is often used for titles, abstracts, captions or contact information.
		Body Copy Editor/XHTML L	Contains text that accepts formatting, hyperlinks, images, tables and more. Typically used for the main body of a page to create formatted content.
Assets		Asset	The asset field allows you to browse for an asset in the asset system. CMS administrators can limit the types of assets that can be chosen during creation of the schema.
		Asset Link Set	The Asset Link Set field gives you the ability to editorially select a list of assets and provide the list with a title. This could be something like a list of images for a slideshow or videos for a playlist. The selectable items can be limited in type by an administrator.
Links		Link	Links to either an internal page in the site tree, an external website, or a document in the `xml\documents` folder. Typically used to create hyperlinks to other locations.
		Link Set	Selects a series of links in re-orderable lists as well as a text title for the set of links. This element generates content in a typical navigation-page node format and supports structured URLs. Content will update automatically when linked pages are checked in.
Functional		Component	Creates a relationship between two nodes in the site tree. This element is a slot into which a chunk of content can be dropped for other pages to use.
		Insert	Pulls content from either an outside source, such as a webpage, or from an internal source. Typically used to pull in content from a webpage outside the site.
		Dynamic Execute	Connects to a .dll file such as for a DbQuery, SMTP connector or SOAP connector. Typically used to retrieve records from external data.
		Password	Encrypts information used by Dynamic Execute components. Typically used to encrypt a database connection string.

	Icon	Type	Description
Organizational	• •	Group Start Group End	Visually groups elements on the **Edit Form** tab. Typically used to group elements that are similar in nature, for example, event-related elements like Event Name, Event Date, and Event Location.
		List	Provides end users the ability to add a variable number of additional sub-elements. Typically used when the number of desired items is unknown.
Navigation		Navigation	Automatically pulls content from a location in the site tree. Typically used to create navigation lists at the top, left and/or bottom of pages.
		Taxonomy Navigation	Pulls page references based on taxonomical categories applied to pages throughout a site. Unlike standard navigation elements, taxonomy navigation does not rely on the hierarchical structure of the site tree to return values.
		References Navigation	Allows a page to reference other content items within the site. Typically used to create cross-references within a site.
		Asset Navigation	The asset navigation indexes all the items in a folder, or in a collection of folders that all live under a parent folder. As with a normal navigation element, you can use Max Depth to change how deeply you would like to navigate, and Max Nodes to limit the number of items that will be returned.
		Asset Taxonomy Navigation	The Asset Taxonomy Navigation queries assets by a category or collection of categories. Results can be filtered to return only those items of certain asset schemas by using Filter Asset Types, or by only those items that appear in a certain folder or folders by using Filter Asset Folders.
Date / Time		Date	*Deprecated* - Lets users select a date by way of a calendar date-picker interface. Date content is stored as server time with a GMT offset in UTC format.
		Local Date	Lets users select a date from a calendar date-picker interface. Local date content is stored as YYYY-MM-DD and has no offset.
		Local Time	Lets users select a time. Local time content is stored as HH:MM:SS and has no offset.
Selection		Checkbox	Selects a binary option such as yes/no or on/off. Typically used to turn on or off some function in the site or some chunk of displayed content.

Icon	Type	Description
	Dropdown	Provides a dropdown list from which a single item can be selected from a predefined list of items. The source for the items in this list can be defined in the schema itself, or can be dynamically generated from nodes within the site tree.
	Multi-Select ✓Hard-coded ✓DbQuery ✓CMS node-set ✓External Scripting	Lets users select multiple choices from a list. The various versions of the Multi-Select element have the same editing interface, but differ on how the list of choices is assembled. The source for items in this list can be hard-coded in the schema, queried from a database, executed by a custom script or dynamically generated from nodes in the site tree.

Accessing Element Help Text

The element type provides clues about how to fill out the element. Help text provides additional, more specific, information for each element.

If help text is available, it appears when a user points the question mark icon to the right side of an element.