

Getting Started with Ingeniux (Version 7)

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Log in at:

<http://cms.oswego.edu> or
<http://www.oswego.edu/cms>

(use Firefox or IE on a PC; Firefox or Safari on a Mac)

Servers

XML¹ files are created and edited on Ingeniux’s **Design Time Server**¹ (staging server in old CMS).

Then they are converted to HTML files by Ingeniux and published to the **Run Time Server**¹ (our web server here at SUNY Oswego).

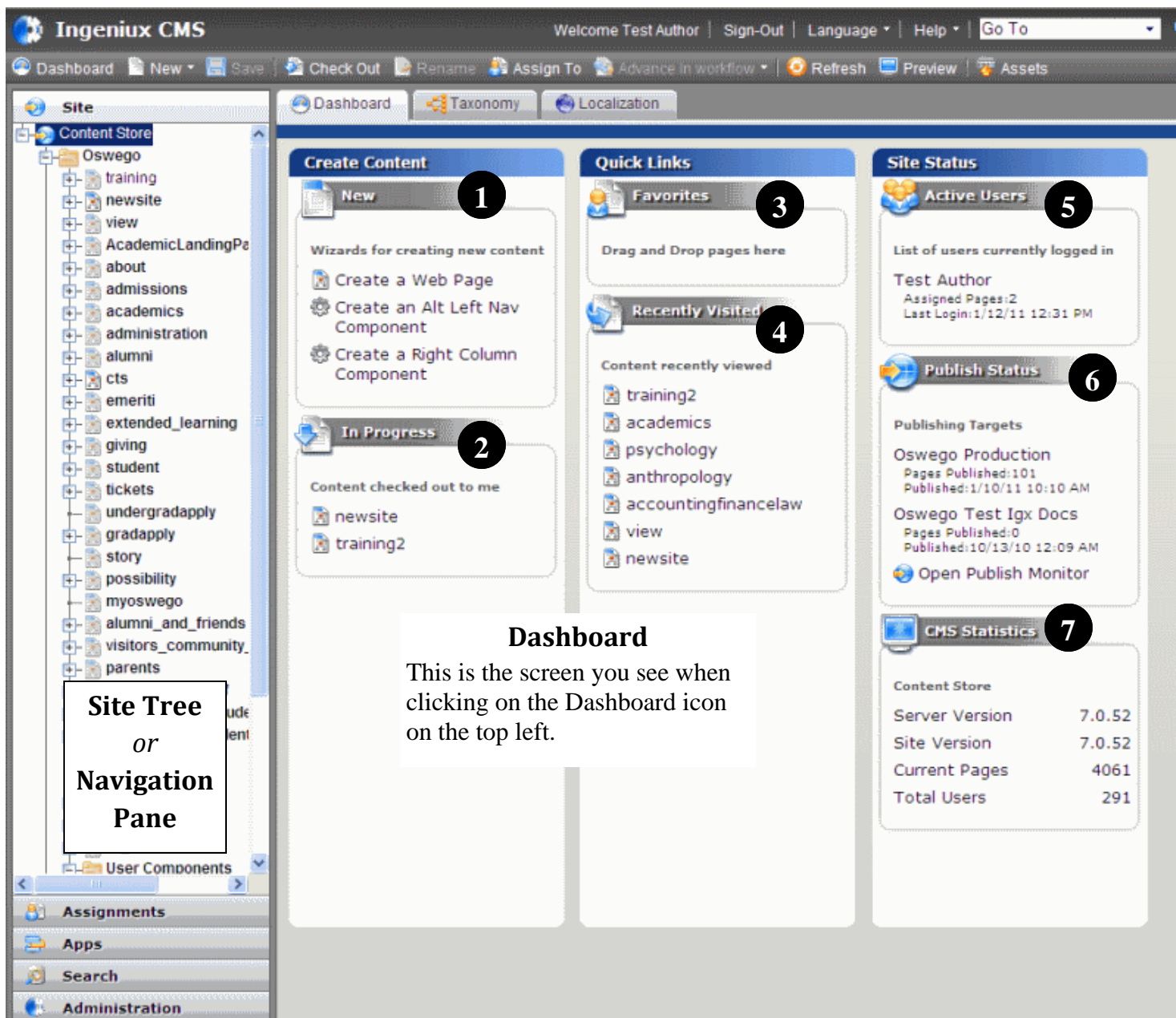
As of 5/27/11, publishing occurs on the hour, daily, from 6 am through 7 pm². There is an additional publish at 9 pm each evening. The full process takes about 50 minutes to complete.

¹ See the glossary on pages 17 and 18

² Temporary publishing times beginning 5/15/12: 6, 8, 10, 12, 2, 4, 6 and 9 pm

Tip: User Name = LakerNetID





1. **New**—Lists wizards for creating new content
2. **In Progress**—Displays pages currently checked out to the person who logged in. Checking files in is important. Check here before you close your browser to be sure all files have been checked in.
3. **Favorites**—Allows the user to create links to pages in the tree for ease of access. Drag and drop a page from the site tree for easy access to your site.
4. **Recently Visited**—Lists pages or components recently viewed
5. **Active Users**—Shows all current users
6. **Publish Status**—Shows when the site was last published
7. **CMS Statistics**— Displays version of the software, total number of pages and number of users with access.

Create a New File

During this session we will create a file in the practice area of the design-time server.

1. In the site tree, click on the practice folder to select it. (It's at the bottom of the tree under training)
2. Click on the New button at the top of the page.
3. Choose Page.

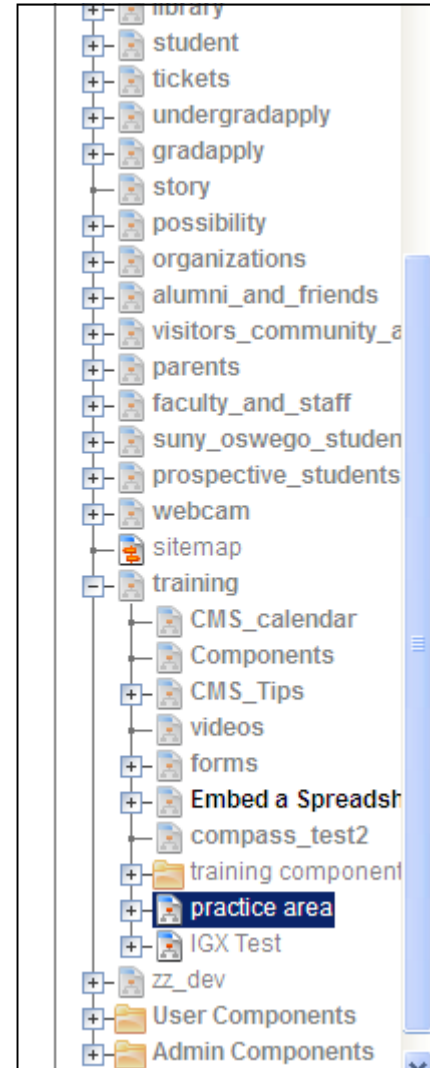


4. Name the page.
Use a relevant name, I.e., 'Biology Staff Directory' or 'about economics.'

Do not use special characters.

You may use _ or - in the file name.

5. The Select Rule should be 'Create a Web Page'
6. Click Create
7. Click on a file to choose the location. The new node will be created under the file you choose. (You may need to click on the plus sign to see your site.)
8. Click OK.
9. Fill in the required fields: (see figure on next page)
 - Title
 - Abstract
 - Header



On the next page we will review the parts of a page. —>

Site Tree/Interface

The screenshot displays the Ingeniux CMS interface. On the left is the Site Tree/Navigation Pane, showing a hierarchy of folders and pages under 'Oswego'. The main editing area is titled 'Page Properties' and includes several fields: 'Page Name' (training2), 'ID' (x8934), 'Schema' (Detail Page), and 'Assigned To' (Test Author). Below these are fields for 'Title [REQUIRED]', 'Abstract [REQUIRED]', 'Header [REQUIRED]', and 'Sub Header', all containing the text 'CMS Training'. The 'Body Copy' field contains a rich text editor with the following content:

Ingeniux Training Calendar

Form Tools on LakerApps (Google Docs)

If you have updated to Laker Apps on Google, you now have a form tool available. It's much easier to use than creating a form in OmniUpdate plus the data is placed in an spreadsheet on Google docs. This spread sheet can then be downloaded and manipulated in Excel or imported into a database.

You can use the form tool by directing users to it with a link ([sample](#)) or, you can embed a line of HTML code in the CMS editor which will show the form on a web page on our SUNY Oswego web server ([sample](#)). It works with both Ingeniux and OmniUpdate.

We have prepared a 2-page information piece (PDF). It is available on [Google docs](#) or on our [website](#). In addition, Google

Required items must have a value in order to check the node in.

8. **ID** (also called XID— each component, page or folder has a unique number)
9. **Title** — required.
10. **Abstract** — required. Use a sentence or two to explain what the page contains. Used by search engines.
11. **Header** — required
12. **Sub Header**
13. **Body Copy**

Components for Your Page

Right column: contains two grouped items.

You may need to click on the arrow to expand this.



Tip: Don't know what a particular item is for? Hover over the question mark.

The screenshot shows a web page editor interface. At the top, there is a section titled "Right Column" with a sub-section "Grouped Items". Below this, there are two main sections: "Right Column Components" and "Right Column Images".

The "Right Column Components" section has a "List Items" area with a "Component" field, a "Pick" button, a "Go To" button, and a "Clear" button. A question mark icon is visible in the top right corner of this section.

The "Right Column Images" section has a "List Items" area with a "RightColumnImage" component. It includes an "Image:" field with a "Browse" button, an "Alt Text:" field, and a "Layout" section with "Alignment:" (a dropdown menu), "Border:" (a text input), "Spacing" (with "HSpace:" and "VSpace:" inputs), and "Size" (with "Width:" set to 160 and "Height:" input).

A yellow pushpin icon is located at the top right of the page. A tip box with a question mark icon points to the question mark icon in the "Right Column Components" section. A text box at the bottom right of the screenshot contains the following text:

Additional component documentation is at <http://www.oswego.edu/Documents/training/Components.pdf>

1. Right column Components:

A. *List items:* Click and drag the right column component here (directions on page 13)

B. *Right column images.* After images are uploaded, browse for them here. (directions on page 11). Be sure to add Alt text

Components on a Page, continued

Page Layout , Sitemap SEO Items and Layout

The image shows three configuration panels from a web management interface:

- Page Layout Options:** Contains 'CompressHeader' and 'RemoveNav' (both checked) and a 'Banner' section with an 'Image' field and a 'Browse' button. A callout box explains that these toggles are used for wide pages and defines 'Compress Header' and 'RemoveNav'.
- Sitemap SEO Items:** Contains 'Keywords' (text input), 'Priority' (dropdown set to 0.5), and 'ChangeFreq' (dropdown set to yearly). A callout box explains the 'Keywords' field and a tip states that only administrators should modify 'Priority' and 'ChangeFreq'.
- Layout:** Shows a 'Name' field with the value 'zzdefault.xml'.

Accessibility:

2 minute video - The students in the following video share some of their experiences with the web and accessibility.

<http://www.webaim.org/media/common/video/k12.asx>

Here are some things we can do to make our web pages more easily accessible for handicapped users.

1. **Alt tags for Images:** When inserting an image you fill in a description that communicates the purpose of the graphic, not its appearance.
2. **Use the 'Format' drop-down in the XHTML Editor.** I.e., Heading1 — These head tags are interpreted by screen readers.
3. **Tables** – Screen readers need to have a description of what is displayed in a table when used to display data.

See: <http://webaim.org/techniques/tables/>

4. **PDFs:** Word 2007 files can be made into accessible PDF files. Documentation is at:
<http://www.oswego.edu/training/AccessiblePDFfromWord.pdf>
5. **Forms:** Ensure that every form element (text field, checkbox, dropdown list, etc.) has a label and make sure that label is associated to the correct form element using the <label> tag.
6. **Multi-media:** Provide a textual equivalent for any non-text element on a page, I.e., Flash.

More information on accessibility:

New York State Office for Technology:

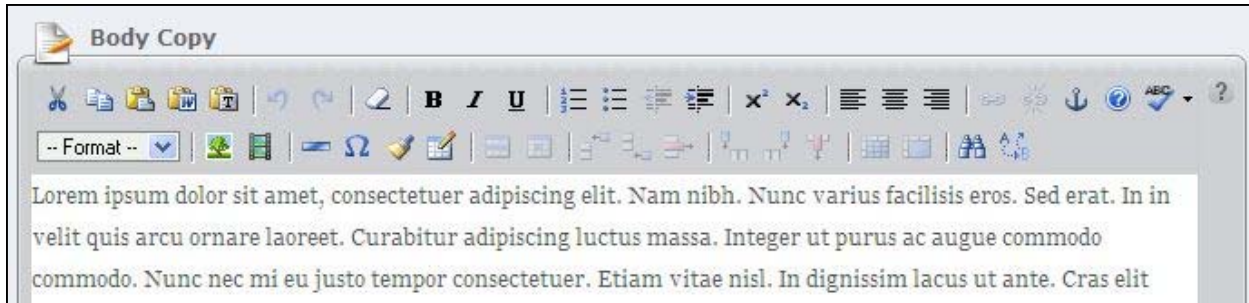
<http://www.oft.state.ny.us/policy/s04-001/index.htm>

WebAim: www.webaim.org

Editing the Body Copy of a File

First, check the file out. To find out what an icon is for, hover over to see the tool tip.

For detailed information on this XHTML editor, log into Ingeniux and go to: [http://cms.oswego.edu/help/ClientHTMLHelp/Universal_Client_Table_of_Contents/\(X\)HTML_Editor_Summary.asp](http://cms.oswego.edu/help/ClientHTMLHelp/Universal_Client_Table_of_Contents/(X)HTML_Editor_Summary.asp)



Linking to an Internal Page

First Way:

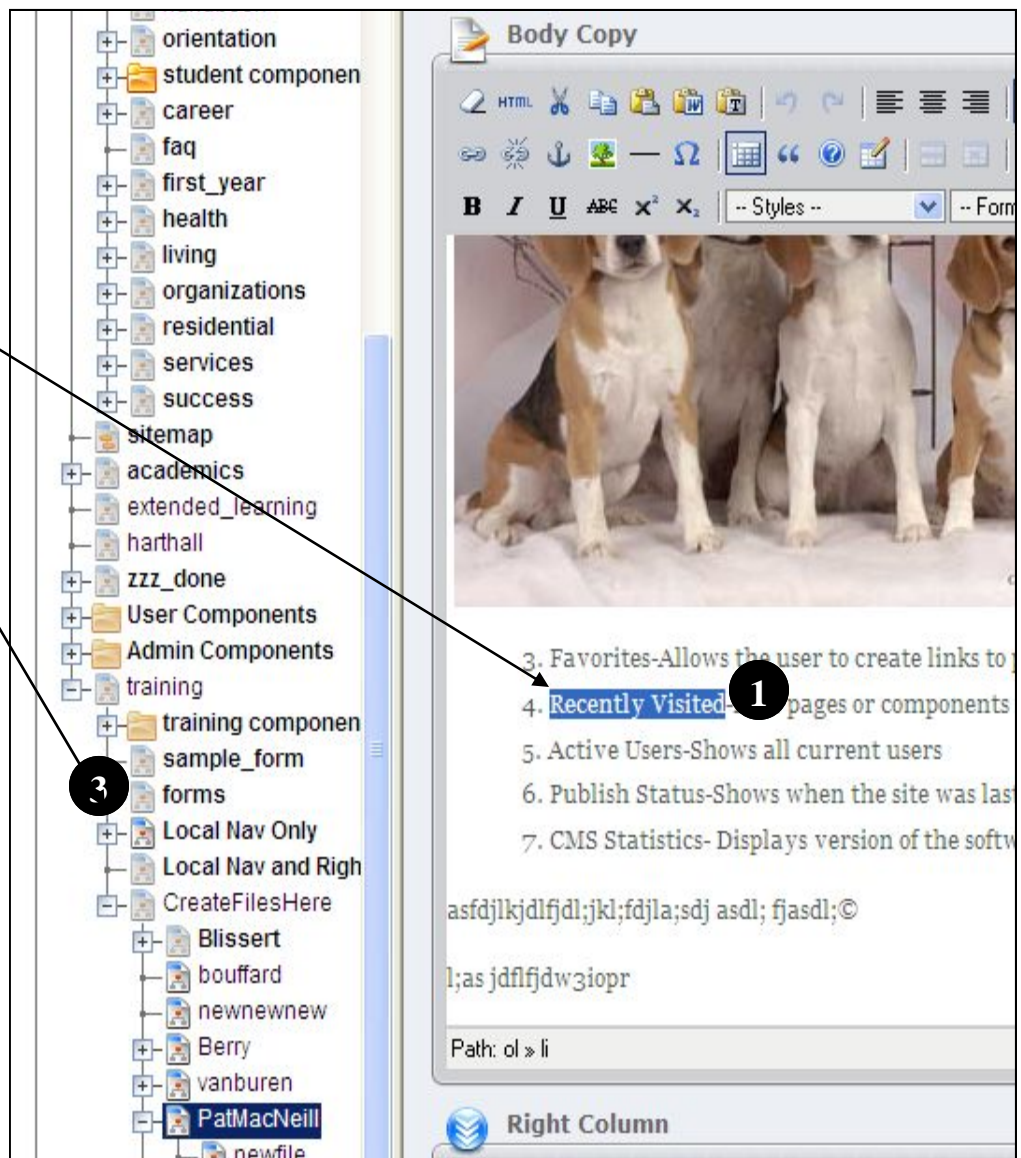
1. Select the words for your link
2. Navigate in the tree to the file you want to link to.
3. Click, hold down and drag the file name over your highlighted link

In this example, the file being edited is named PatMacNeill.

The file we are linking to is named forms.

2nd Way:

1. Select the words
2. Click on the chain icon
3. Choose the Internal radio button
4. Enter the XID
5. Click insert



Editing a File, continued

Linking to a Document

1. Check the node out
2. In the body copy, select words or image for the link
3. Click on the chain icon
4. If an old link is there, delete
5. Click on document radio button
6. Browse for the file
 - it will be in Documents/*name of your account*
 - you will need to click on the plus signs to see folders and contents of folders
7. Click on the folder. At this point you can upload a document if you wish.
8. If the document is already uploaded, select the file, click OK
9. Click Insert

Insert an Image

1. Click where you want to place the image.
2. Click on the image icon (it looks like a tree).
3. Click on the browse button (just to the right of the image URL area)
4. In the dialog box, click on the plus sign beside the Images folder
5. Navigate to your account's folder, I.e., practice
6. Click on OK
7. Enter an image description
8. Click on insert

Tables

1. Click where you want to insert the table.
2. In the dialog box, enter the # of columns and rows.
3. Use the recommended settings shown for the rest and click insert.
4. To edit these settings, right-click inside the table and choose table properties.

Editing Tips:

After edits are finished be sure to save and check the node back in.

To close up spaces between paragraphs, use a soft return (Shift + Enter)

If you copy and paste from Word, be sure to use the button 'Paste from Word' or 'Paste as Text'.

Aligning cell contents in a Table:

Use this code in the HTML body copy:

```
<style type="text/css"><!--  
td{ vertical-align:text-top;  
} --></style>
```

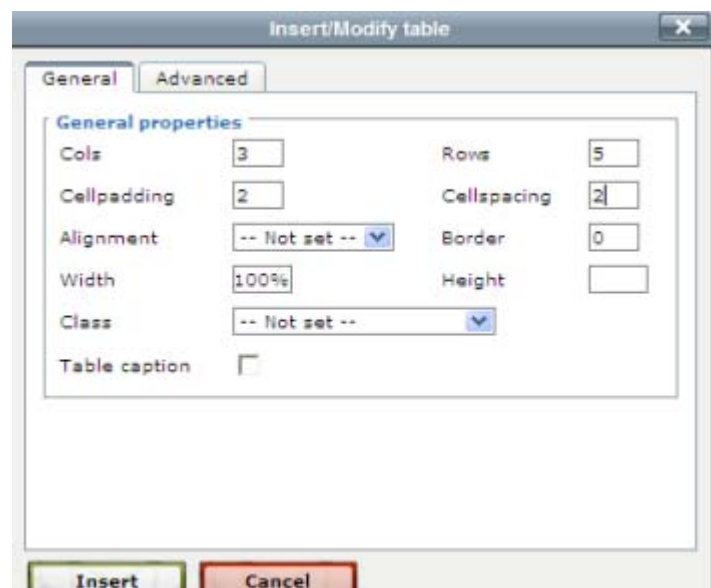
If you have a file checked out but cannot click in the editing area, try clicking on another file in the tree. Then, click back in your file's editing area.

If you know the XID number of a file, you can search for it in the Go To box (at the top).

Depending on the browser, XID numbers will show up as tool tips when hovering over the file name in the tree.

More tips at :

http://www.oswego.edu/training/CMS_Tips.html

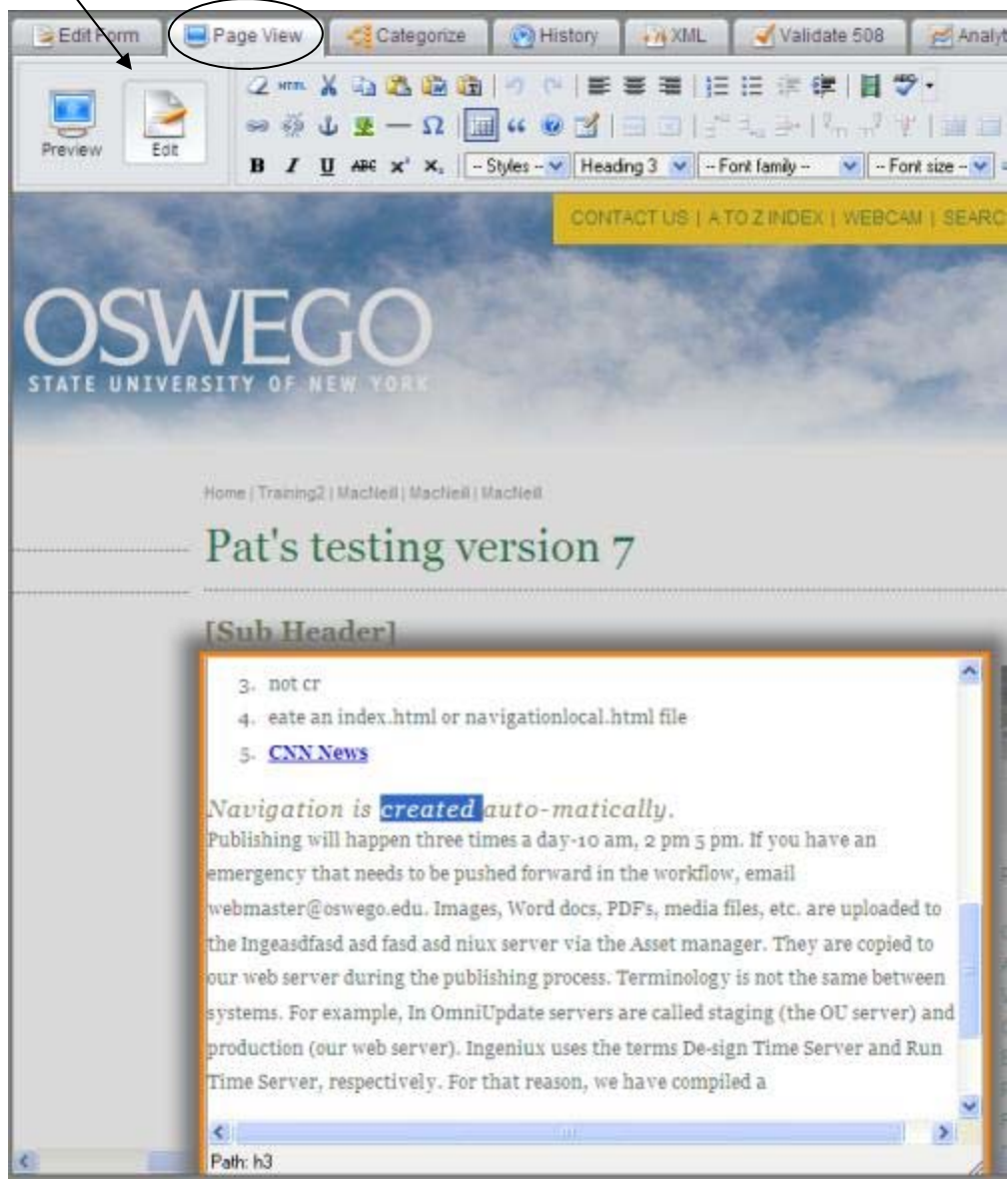


Editing a File, continued

Edit in Page View Mode

In Version 7 you can edit the Head, Sub head and body text of page while in Page View mode.

- 1. Click on the Page View tab
- 2. Then click on edit



Editing a File, continued

Insert Right Column Image (not component)

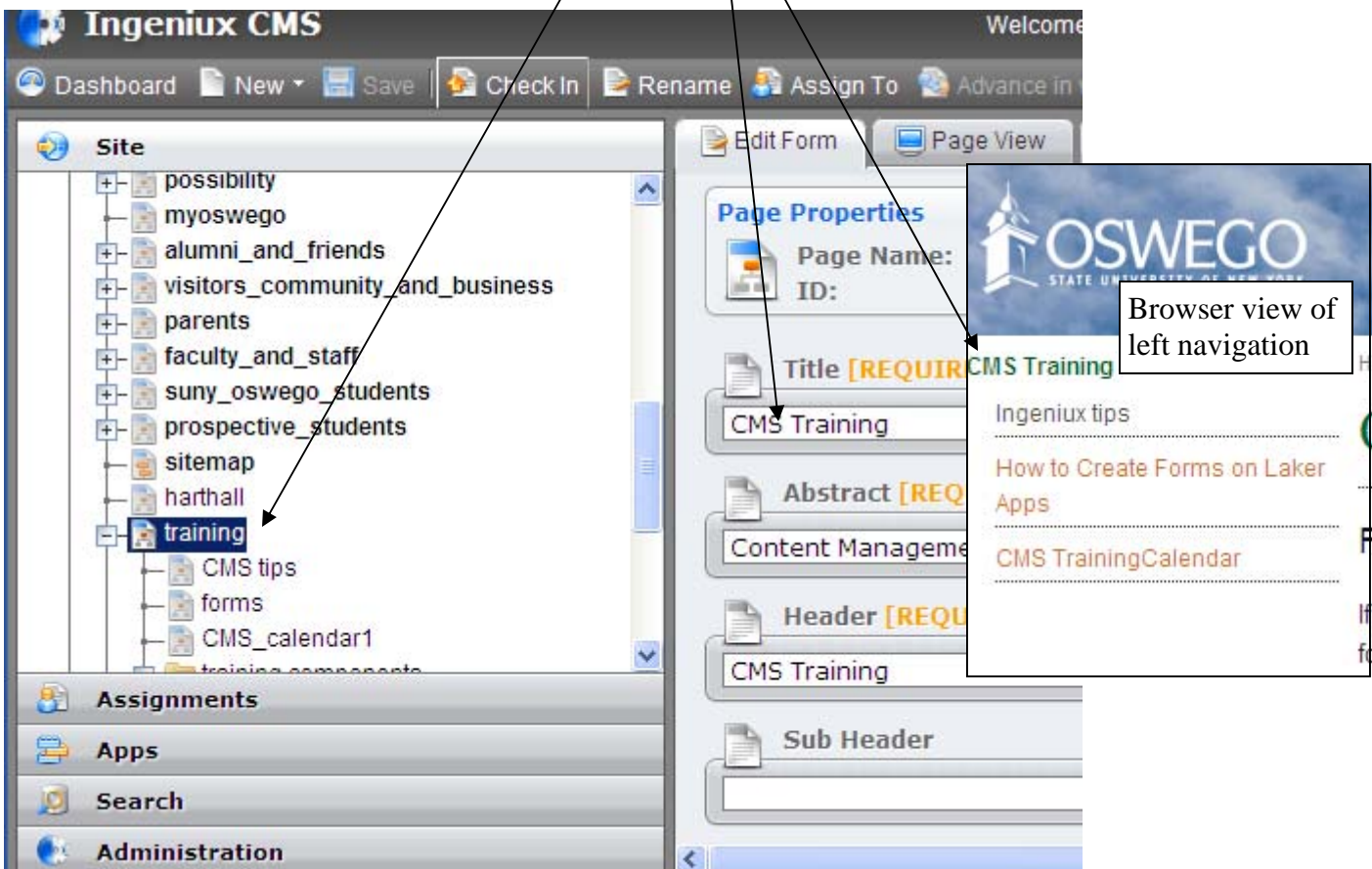
1. In the Right Column area, below the body copy, click on browse.
2. In the dialog box, click on the plus sign beside the Images folder
3. Navigate to your account's folder, I.e., training
4. Choose the image file and click OK.
5. Add the alt text (if you don't see this, click on the arrow to expand)
6. To add another image, click on the plus sign.

Navigation

The left navigation is automatically created by the CMS.

Names of links in the left navigation will be what you type in the **Title** area. The Title will also show in the top of the browser. When you first create the file, the **Title** and file name will be the same. You may change either one.

In the screen snapshots below, the **file name** and **Title** are different.



Navigation — continued

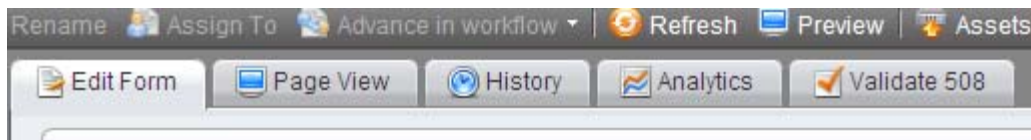
The **Title** shows at the very top of the browser window. It is pre-pended by 'SUNY Oswego.'

The **file name** will show in the breadcrumb links on the page.



Tip: You cannot insert images or links to other files (i.e., Word, PDF) into the left navigation. Navigation is created from the file structure of your site.

Tabs Defined



Edit Form—Edit the title, description, headers and copy of the page; add/remove components.

Page View—A preview of what the page will look like on the web server. Can edit headers and body copy only in this view.

History—Identifies who has edited the page with dates and the ability to revert to a previous version.

Analytics—Number of page views from Google Analytics. You can select the time period.

Validate 508—Tests your page for accessibility (not entirely accurate, use cynthiasays.com instead).

More on Components:

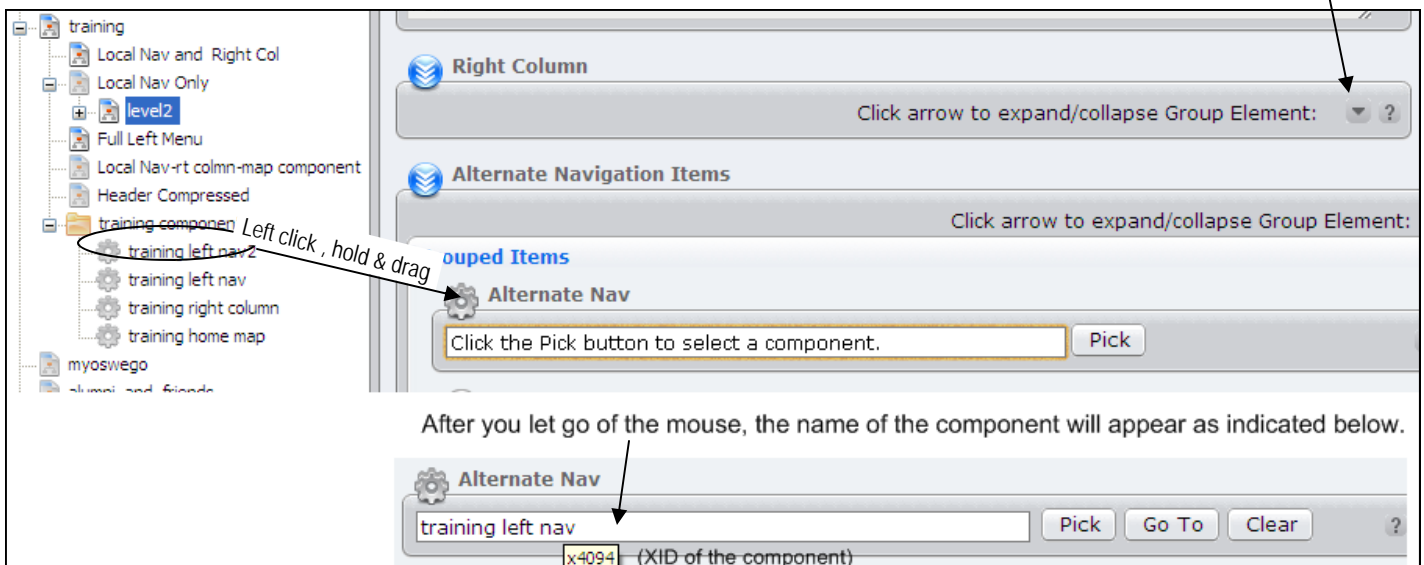
When each account is created, two optional components are added; Alternate Navigation Component and Right Column Component. To see them, you may need to expand the area. Click on the arrow.

Alternate Navigation Items:

This component creates navigation for just the files in your account, not the full menu of the top-level area.

To utilize this, scroll down to the Alternate Nav Items area

Click and drag the component to the first space in the Alternate Nav field. The field will turn orange around the edge.



Right Column Component:

Click and drag the right column component in your account to the blank area.

Right Column Image:

First upload the image to your account's image area (directions on page 14).

In the component, browse for the image file, then click OK.

Be sure to add alt text.

Component documentation is located here:

<http://www.oswego.edu/Documents/training/Components.pdf>

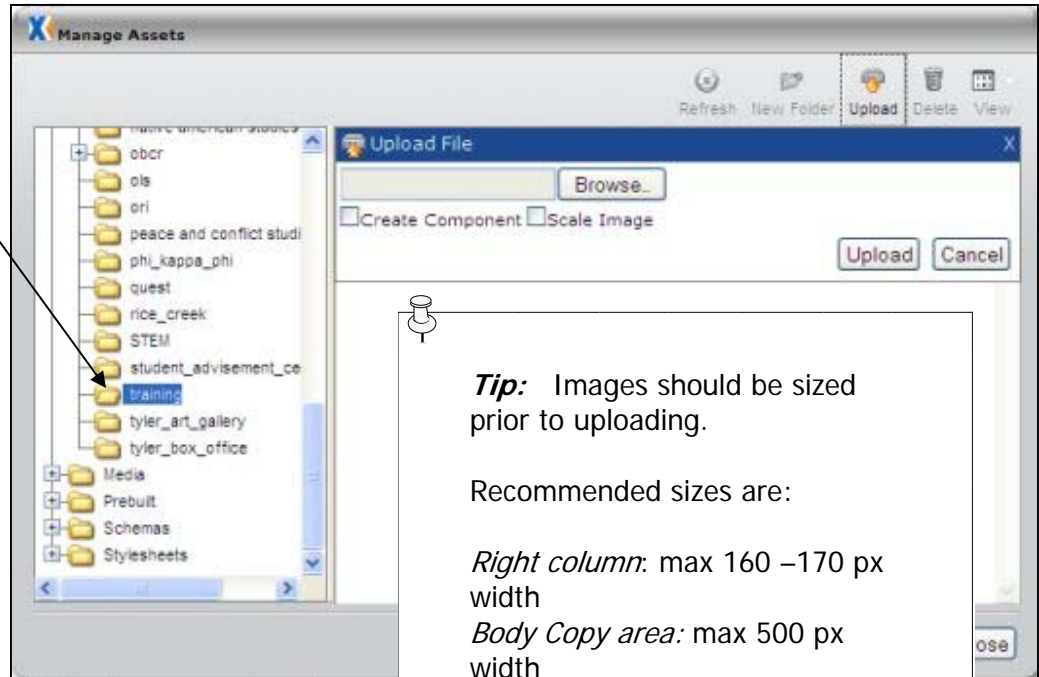
Tip:

Don't use the 'Pick' button to choose a component. There are thousands in the system. Instead use the click and drag method illustrated.

Manage Assets

Upload an image file (the file should be sized first)

1. On the top menu click **Assets**
2. Click on the plus sign beside the Images folder
3. Navigate to your account's folder, I.e., practice
4. Browse to the image file on your PC to upload
5. Click Open
6. Click Upload
7. Click Close



Upload a document (PDF, Word, PPT, etc.)

1. On the top menu click **Assets**
2. Click on the plus sign beside the Documents folder
3. Navigate to your account's folder, I.e., training
4. Browse to the document file to upload
5. Click Open
6. Click Upload
7. Click Close

Checking In/Out

You must check a file out before editing. After editing, be sure to **check the file in** in case someone else in your account wants to edit the file. In addition, it will not publish if checked-out.

To see the files checked out to you, click on the Dashboard. The list is in the lower left under 'In Progress.'.

Duplicating a Page

- Right click on the page.
- Choose 'copy'
- Right click on the parent page
- Choose 'paste'
- Be sure to modify the file name, title, etc.



Tip: Choose a page that has no children as the system will replicate that node and everything under it.

Mark for Publishing

- Right click on the file name in the navigation pane.
- Choose 'Mark for publish'
- Leave the file marked for publishing
- HTML files are created and copied to the web server
- As of 5/27/11, publishing occurs on the hour, daily, from 6 am through 7 pm. The full process takes about 50 minutes to complete.
- The whole site is published at 9 pm every day.



Tip: Bold names mean nodes are marked for publishing. The system only publishes files that have been modified since the last publish and are checked in.

Always leave nodes marked for publish.

Why?

-- During the publishing process, any files unmarked for publish will be deleted from the Run-time server. The files will remain in Ingeniux and can be marked to publish at time of the next publish.

What if you are working on a page and it's not ready to publish?

-- Leave the page checked-out and the system will not publish it. Be sure to leave it marked

Make sure you you check pages in or they will not publish.

Appendix 1

Supported Client Browser/Operating System Combinations

Ingeniux version 7

From Ingeniux - July, 2011

Universal Client – for editors and authors:

Windows XP:

Internet Explorer 6
Internet Explorer 7
Internet Explorer 8
Firefox 3.0
Firefox 3.5
Firefox 3.6
Safari 3.2
Safari 4
Chrome 4

Mac OS X:

Safari 3.2
Safari 4
Firefox 3.0
Firefox 3.5
Firefox 3.6

Windows Vista:

Internet Explorer 7
Internet Explorer 8
Firefox 3.0
Firefox 3.5
Firefox 3.6
Safari 3.2
Safari 4
Chrome 4

SUNY Oswego log in address:

<http://cms.oswego.edu/oswego> *or* <http://www.oswego.edu/cms>



Tip: We're Never Really Finished

Remember that web content is like food: It can get stale if left sitting for too long. Publishing web pages is not an end, but a beginning. You may want to set up a calendar where you, or a student worker, would go through your pages to assure your content is up-to-date. Are there dates that have passed? Contacts listed who are no longer in your office? Do the links still work? That way you can both best communicate with your audiences and help your users find what you want.

... Tim Nekritz

Glossary

Ancestor	refers to page(s) existing on levels higher than the currently selected page in the Site tree.
Ancestor Navigation	navigation(s) referencing nodes one level and above the current page.
Assets	user can upload documents, images, media, or other binaries into Ingeniux
Assign To	administrative function that assigns the selected page to another user.
Assignment List	provides a list of pages currently assigned to the logged in user.
Attributes	additional data contained within element tags which describe the element it is associated with.
Check-In	process of submitting changes to the CMS, prior to publishing a page.
Check-out	process of requesting permission to make changes to a page.
Child	refers to page(s) existing one level below the currently selected page in the Site tree.
Child Navigation	navigation(s) referencing nodes below the current page.
Component	contains content that can be reused in multiple pages of the site. Created by administrators.
Content Store	set of xml pages that make up the site is collectively referred to as the content store. It is also called the Navigation Pane and Site Tree
Dashboard	Gives a brief snapshot of information including quick links, files checked out to you and files you have recently visited.
Design Time Server	Ingeniux server used by editors to build, manage, and publish content. (Also known as the Development Server.)
Edit Pane	displays selected page in Site Tree and provides the interface for editing the currently selected page if a given page is checked out and it is assigned to the user or the user that has administrative rights to the page.
Mark for Publish	marks a selected page for publish; pages marked for publish are published on the next full publish.
Navigation	part of a page that provides a link to another resource.
Navigation Pane	also called the Site Tree. Logical representation of how pages are organized into ancestors, siblings, and children.
Node	file, component or folder
Page Creation Rule	rule specifying a page template used to create a new page as well as specify the location within the site tree the new page is created. Page Creations are used in conjunction with workflow to simplify the creation and management of content.
Page Types	specifies a particular page template to use when creating a new page.
Parent	refers to page(s) existing one level above the currently selected page in the Site Tree.
Permissions	refers to the functions a given User Group is able to perform, i.e. see site tree, delete pages, create pages, etc.
Preview	applies specified style sheet to the current selected page to provide a view of what the page will look like on the run time server.

Publish	initiates the processing of a page by Ingeniux CMS in order to ready the page for posting to the live, world-facing site.
Recycle Bin	stores deleted pages. Pages can be restored by administrators.
Replication	process of copying published pages from the Design-time to the run-time server.
Revert (to Prior Version)	action to restore a previous version of a page via the History Tab and the Versioning functionality.
Rollback	action to rollback to the currently checked in version of the page there by deleting any changes made since the last check in.
Run Time Server	Our server here at SUNY Oswego. It serves content that has been published by the design time site. (Also known as the Production Server)
Sibling	refers to page(s) existing on the same level as the currently selected page in the Site Tree.
Sibling Navigation	design time directory from which Peer Sync replicates content to a run time site (Target directory).
Site Tree	logical representation of how pages are organized into ancestors, siblings, and children.
Start Page	attribute of an ancestor navigation element which indicates the highest level node to pull into the navigation; navigation stops one page below the page specified.
Unmark for Publish	unmarks a selected page for publish preventing this page from being published.
Upload	function that allows the user to load documents, images, media, or other binaries onto the design-time server (use Asset button to upload).
User Groups	divide users into logical groups to which permissions are assigned.
Users	account with access to the Ingeniux system; must be a member of a user group to be able to perform any functions.
Validate 408	shows if the page is accessible
Versioning	provides the storage of up to a predefined number of previously checked in versions of a given page.
Workflow	provides an automated mechanism for moving content through the Ingeniux system. A workflow process is defined by a sequence of work states that a page must move through as work is completed.
Work state	the location of a given page within a workflow.
XID	Each component, file and folder in the system has a number.
XML files	utilize tags to logically structure content. This document does not contain any formatting information.
XSLT	style sheet language used to format an XML document.