Getting Started with Ingeniux (Version 8)

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Log in at:

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

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

Servers

XML\(^1\) 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 8/27/13, publishing occurs on the hour, from 6 am through 7 pm. There is an additional publish at 9 pm each evening. The full process takes about 30 minutes to complete.

\(^1\) See the glossary on pages 17 and 18
Dashboard
This is the screen you see when clicking on the Dashboard icon on the top left.

1. **New** — Wizards for creating new content — see page 3 for recommended method.
2. **In Progress** — Displays pages currently checked out to you. Checking files in is important. Check here before you close your browser to be sure all files have been checked in.
3. **Favorites** — Allows you 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 current version of the software, total number of pages and number of users.
Create a New File

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

1. In the site tree, click on a page to select it.
2. Click on the New button (top left).

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. The page will be placed under the node you have chosen and will be open for editing.

7. Fill in the required fields: (see figure on next page)
   - Title
   - Abstract
   - Header

Next: the Edit Form tab. — >
Edit Form tab

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

8. **Page Name** (file name, node name) — Case sensitive. Once this page is published the best practice is never to change the file name. Don’t use any special characters in the name except and underbar ( _ ) or a hyphen ( - ).

9. **ID** — (also called XID) Each component, page or folder has a unique number.

10. **Title** — Required.

11. **Abstract** — Required. Use a sentence or two to explain what the page contains. Search engines use this to categorize the page.

12. **Header** — Required

13. **Sub Header** — Optional

14. **Body Copy** — See pages 8-10 for more information
Edit Form, cont.

Components — Content that can be reused on multiple pages.

Right column: contains two grouped items.
You may need to click on the arrow on the right to expand this.

1. **Right column Components:**
2. **List items:** To add, click, hold down and drag a right column component here.
3. To add additional right column components, click on the plus sign.

4. **Add a right column image.** (not component),
   - Click on browse.
   - In the dialog box, click on the plus sign beside the Images folder
   - Navigate to your account’s folder, i.e., training
   - Choose the image file and click OK.
   - Add the alt text (if you don’t see this, click on the arrow to expand)
   - To add another image, click on the plus sign.

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

*Tip:* Don’t know what a particular item is for? Hover over the question mark to get a tool tip.
Edit Form, continued

Alternate Navigation, Page Layout Options

Alternate Navigation:

Left click, hold down and drag a left nav component here.

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

Page Layout Options:

These toggles are only used when you need a wide page — such as for a large data table.

Compress Header: This removes the top header and left nav. Check this if you need extra space on a page.

RemoveNav: This removes the left navigation.
Accessibility:

2 minute video - The students in the following video share some of their experiences with the web and accessibility. http://www.youtube.com/watch?v=BEFgnYktC7U

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., Heading 1 — 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 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 Page

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

Linking to an Internal\(^1\) 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 node’s name over your highlighted link

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

The page 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. Choose the file.
5. Click insert

\(^1\)Internal — page that exists in Ingeniux
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. Click on the chain icon.
3. If an old link is there, delete.
4. Click on document radio button.
5. 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.
6. Click on the folder. At this point you can upload a document if you wish.
7. If the document is already uploaded, select the file, click OK.
8. Click Insert.
9. Be sure to add (PDF) or (Word) after the link.

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)

Recommended Image Sizes:
*Right column:* max 170 - 180 px width
*Body Copy area:* max 550 px width
(depending if there is a right column)

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
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

3. It is a toggle. After you click ‘Edit’, Preview will show.

4. You may need to click check Show All Pages at the top to see the navigation.
Editing a File, continued

Navigation

The left navigation is automatically created by the CMS via the alternate left nav component.

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 **page name** and **Title** are different.

**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.

The following tabs are not functional.

**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).
**Manage Assets** (images, PDF, Word, Excel files)

**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.”

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**Tip:**
Images should be sized prior to uploading.

Recommended sizes are:
- **Right column:** max 170 - 180 px width
- **Body Copy area:** max 550 px width
  (depending if there is a right column)

See documentation at:
http://www.oswego.edu/Documents/training/Images.pdf

**Tip:**
When you upload an asset to Ingeniux, it may take up to 2 hours before the asset is viewable/clickable in Ingeniux’s Page View or Preview mode.
Duplicating a Page

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

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

Mark for Publishing

1. Right click on the page or component’s name in the navigation pane.
2. Choose ‘Mark/Unmark for Publish’
3. Make sure the check box has a check mark.
4. Click ‘OK’
5. Publishing occurs every hour, daily, from 6 am through 7 pm. The full process takes about 30 minutes to complete.
6. The whole site is published at 9 pm every day

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 for publish.
Appendix 1

Supported Client Browser/Operating System Combinations
Ingeniux version 8
From Ingeniux - Oct, 2012

Universal Client – for editors and authors:

Windows XP/Vista/7:
- Internet Explorer 6
- Internet Explorer 7
- Internet Explorer 8 (supported as of v6.0 SR5)
- Internet Explorer 9 (supported as of v6.0 SR6 and higher)
- Firefox 2.x, 3.x, 4.x, 5.x, 6.x, and 7.x
- Chrome 9, 10, and 11 (as of v7.0)
- Safari 3.2x, 4.x, and 5.x (as of v7.0)

Mac OS X 10.4 (Tiger)/10.5 (Leopard)/10.6 (Snow Leopard)
- Safari 3.2x, 4.x, and 5.x (as of v7.0)
- Firefox 2.x, 3.x, 4.x, 5.x, 6.x, and 7.x

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**

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ancestor</td>
<td>refers to page(s) existing on levels higher than the currently selected page in the Site tree.</td>
</tr>
<tr>
<td>Ancestor Navigation</td>
<td>navigation(s) referencing nodes one level and above the current page.</td>
</tr>
<tr>
<td>Assets</td>
<td>user can upload documents, images, media, or other binaries into Ingeniux.</td>
</tr>
<tr>
<td>Assign To</td>
<td>administrative function that assigns the selected page to another user.</td>
</tr>
<tr>
<td>Assignment List</td>
<td>provides a list of pages currently assigned to the logged in user.</td>
</tr>
<tr>
<td>Attributes</td>
<td>additional data contained within element tags which describe the element it is associated with.</td>
</tr>
<tr>
<td>Check-In</td>
<td>process of submitting changes to the CMS, prior to publishing a page.</td>
</tr>
<tr>
<td>Check-out</td>
<td>process of requesting permission to make changes to a page.</td>
</tr>
<tr>
<td>Child (ren)</td>
<td>refers to page(s) existing one level below the currently selected page in the Site tree.</td>
</tr>
<tr>
<td>Child Navigation</td>
<td>navigation(s) referencing nodes below the current page.</td>
</tr>
<tr>
<td>Component</td>
<td>contains content that can be reused in multiple pages of the site. Created by administrators.</td>
</tr>
<tr>
<td>Content Store</td>
<td>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.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Gives a brief snapshot of information including quick links, files checked out to you and files you have recently visited.</td>
</tr>
<tr>
<td>Design Time Server</td>
<td>Ingeniux server used by editors to build, manage, and publish content. (Also known as the Development Server.)</td>
</tr>
<tr>
<td>Edit Pane</td>
<td>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.</td>
</tr>
<tr>
<td>Mark for Publish</td>
<td>marks a selected page for publish; pages marked for publish are published on the next full publish.</td>
</tr>
<tr>
<td>Navigation</td>
<td>part of a page that provides a link to another resource.</td>
</tr>
<tr>
<td>Navigation Pane</td>
<td>also called the Site Tree. Logical representation of how pages are organized into ancestors, siblings, and children.</td>
</tr>
<tr>
<td>Node</td>
<td>file, component or folder</td>
</tr>
<tr>
<td>Page Creation Rule</td>
<td>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.</td>
</tr>
<tr>
<td>Page Types</td>
<td>specifies a particular page template to use when creating a new page.</td>
</tr>
<tr>
<td>Parent</td>
<td>refers to page(s) existing one level above the currently selected page in the Site Tree.</td>
</tr>
<tr>
<td>Permissions</td>
<td>refers to the functions a given User Group is able to perform, i.e. see site tree, delete pages, create pages, etc.</td>
</tr>
<tr>
<td>Preview</td>
<td>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.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Publish</td>
<td>initiates the processing of a page by Ingeniux CMS in order to ready the page for posting to the live, world-facing site.</td>
</tr>
<tr>
<td>Recycle Bin</td>
<td>stores deleted pages. Pages can be restored by administrators.</td>
</tr>
<tr>
<td>Replication</td>
<td>process of copying published pages from the Design-time to the run-time server.</td>
</tr>
<tr>
<td>Revert (to Prior Version)</td>
<td>action to restore a previous version of a page via the History Tab and the Versioning functionality.</td>
</tr>
<tr>
<td>Rollback</td>
<td>action to rollback to the currently checked in version of the page there by deleting any changes made since the last check in.</td>
</tr>
<tr>
<td>Run Time Server</td>
<td>Our server here at SUNY Oswego. It serves content that has been published by the design time site. (Also known as the Production Server)</td>
</tr>
<tr>
<td>Sibling</td>
<td>refers to page(s) existing on the same level as the currently selected page in the Site Tree.</td>
</tr>
<tr>
<td>Sibling Navigation</td>
<td>design time directory from which Peer Sync replicates content to a run time site (Target directory).</td>
</tr>
<tr>
<td>Site Tree</td>
<td>logical representation of how pages are organized into ancestors, siblings, and children.</td>
</tr>
<tr>
<td>Start Page</td>
<td>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.</td>
</tr>
<tr>
<td>Unmark for Publish</td>
<td>unmarks a selected page for publish preventing this page from being published.</td>
</tr>
<tr>
<td>Upload</td>
<td>function that allows the user to load documents, images, media, or other binaries onto the design-time server (use Asset button to upload).</td>
</tr>
<tr>
<td>User Groups</td>
<td>divide users into logical groups to which permissions are assigned.</td>
</tr>
<tr>
<td>Users</td>
<td>account with access to the Ingeniux system; must be a member of a user group to be able to perform any functions.</td>
</tr>
<tr>
<td>Validate 408</td>
<td>shows if the page is accessible</td>
</tr>
<tr>
<td>Versioning</td>
<td>provides the storage of up to a predefined number of previously checked in versions of a given page.</td>
</tr>
<tr>
<td>Workflow</td>
<td>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.</td>
</tr>
<tr>
<td>Work state</td>
<td>the location of a given page within a workflow.</td>
</tr>
<tr>
<td>XID</td>
<td>Each component, file and folder in the system has a number.</td>
</tr>
<tr>
<td>XML files</td>
<td>utilize tags to logically structure content. This document does not contain any formatting information.</td>
</tr>
<tr>
<td>XSLT</td>
<td>style sheet language used to format an XML document.</td>
</tr>
</tbody>
</table>