

OmniUpdate User Training

Review for Updates on: March 1, 2019

This training is designed to familiarize you with the OmniUpdate content management system, or CMS, and how it can be used to make updates to websites within your account.

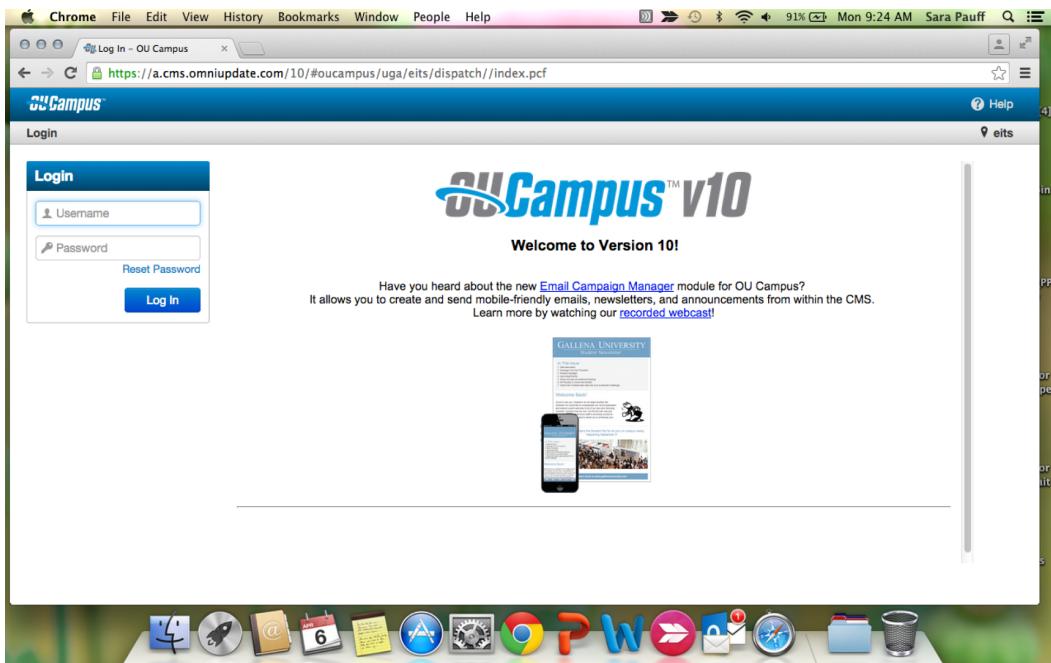
Overview

This guide uses the website for Enterprise Information Technology Services (EITS) as an example. Your website may look different and have different folders and pages, but the tools for creating and editing pages are the same.

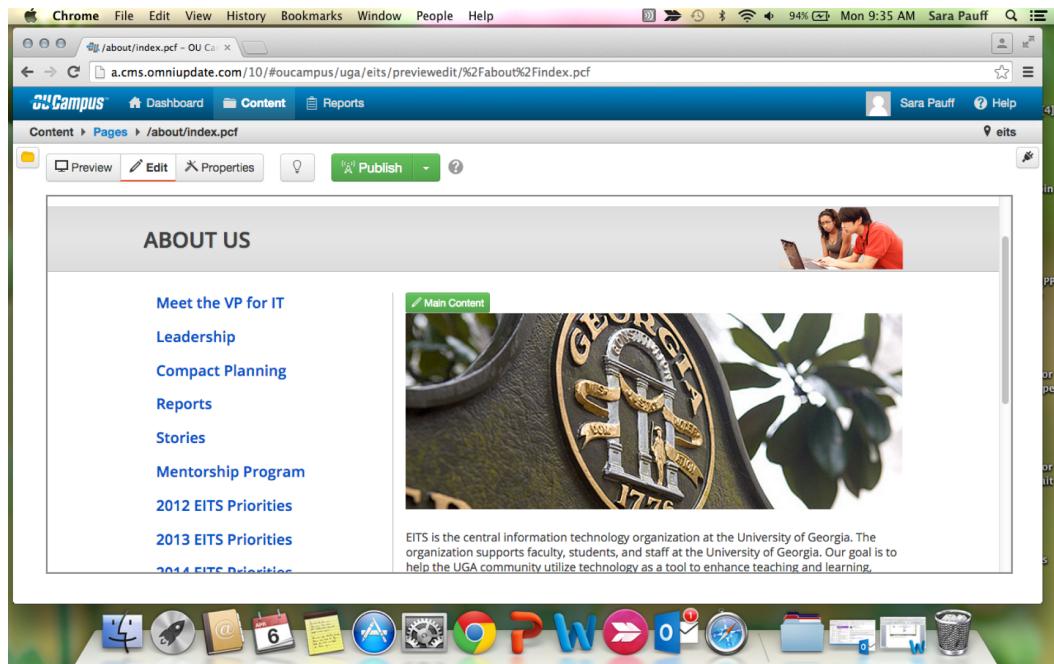
This guide covers the basics of creating and editing pages. For more advanced functions, such as editing headers and footers and creating new sites, please contact your site administrator.

Logging In

Depending on how your website was set up, you may be able to login via a hidden link included somewhere on your page. You will be advised of the location of this link when your website is created. If you do not have a hidden link, you can also log in to your dashboard by visiting the link provided by your site administrator.



When you click on the hidden link or visit the login URL, you will be taken to the OmniUpdate log-in page.



OmniUpdate Workflow Process

In OmniUpdate, a site administrator can set access settings for each user, so a user is allowed certain privileges and given certain restrictions based on their "level" within the site.

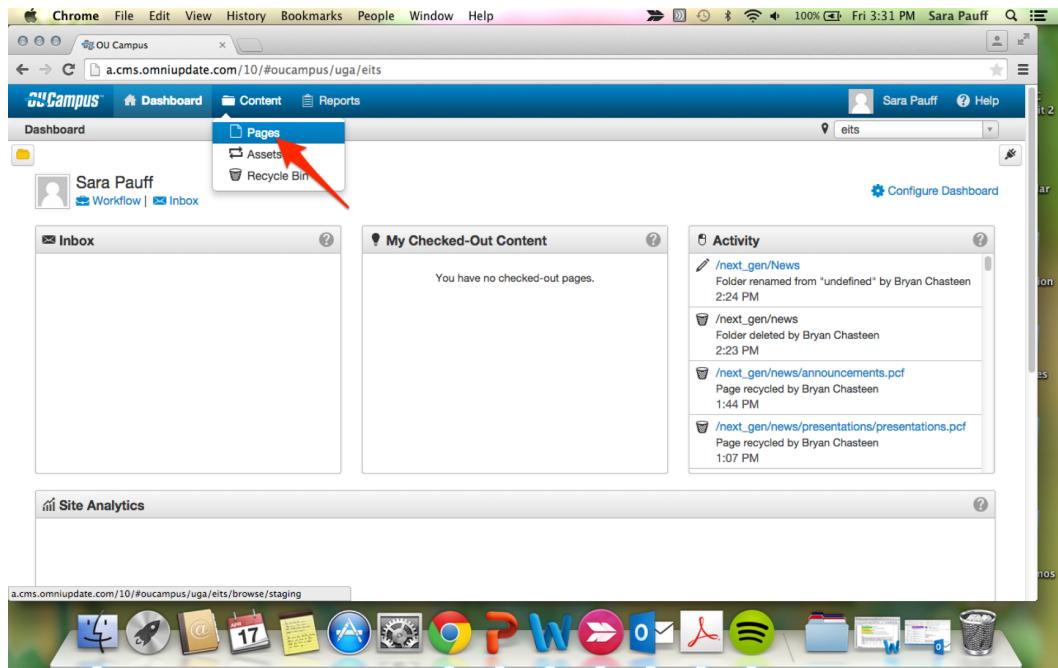
There are several levels. Site administrators and designers are allowed to make changes to the page structure and source code. Other levels may be able to only edit, create and publish content; some levels of users may be able to edit content, but not publish, and others can view content but not make changes.

This also allows for a workflow for posting and editing content, where you can set up some users as "approvers" who review content before publishing it.

For example, if you have the ability to edit content and create new content but not publish, instead of a **green Publish** button, you will see a **blue** button that says **Submit**. Clicking this button will bring up a message window to send the page to your designated approver.

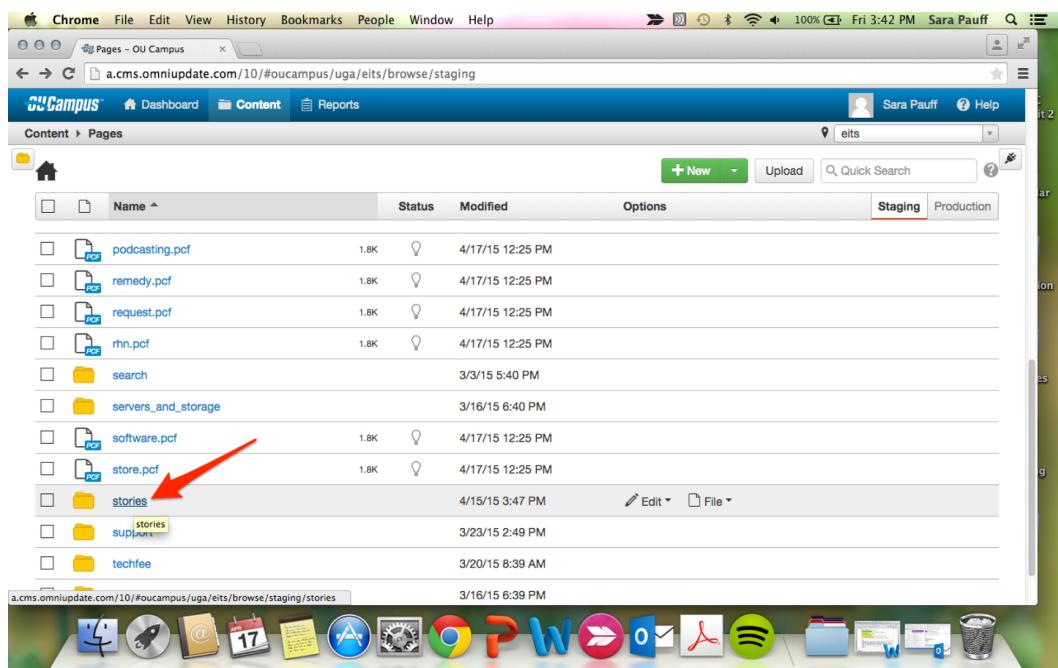
Finding a Page in the OmniUpdate File Structure

From your OmniUpdate dashboard, you can find the page you want to edit by scrolling over the **Content** link at the top of the page and clicking on **Pages**.



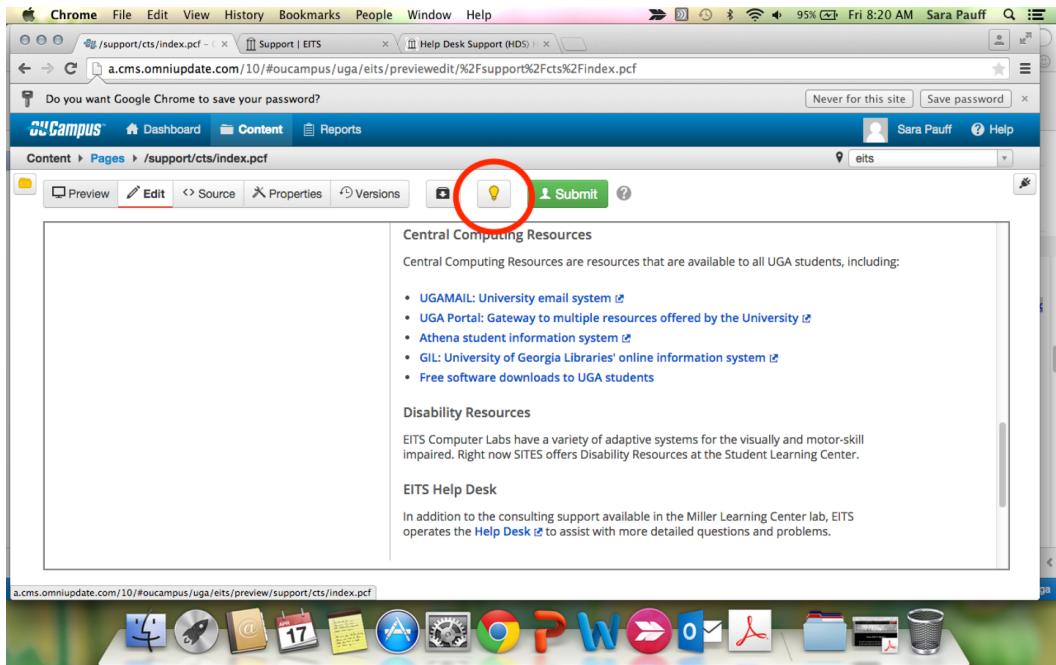
Pages and content in OmniUpdate operate under a folder system. Each section of your website is a folder. To edit a page, you'll need to find the section/folder that your page is in, and open it.

For example, if I wanted to edit one of the Stories pages on the EITS website, I would need to click on the Stories folder, which would bring up a list of pages under the Stories section.



Editing Content on an Existing Page

To edit content on an existing page, first log into OmniUpdate and find the page that you wish to edit. After you open it, you should see several options at the top of the page, including **Preview** and **Edit**.



You will also see a **light bulb icon**. If the icon is **yellow**, that means the page is checked out to you. You can check the page in or out by clicking on the light bulb icon. You can only make changes to the page when it is checked out to you. If there is a **red** lock icon instead of a light bulb, the page is checked out to someone else and you cannot edit it until the page is checked back in by that user or the site administrator.

To make changes, click on **Edit** in the grey toolbar at the top of the page.

Green edit buttons should appear over the content you have access to update and change. For example, if you are granted access to edit the main content on a page, a **green** button will appear over the main content. Once you click on it, you will be able to make changes to the content within that area. Depending on your level within OmniUpdate and privileges, you may not have access to edit every part of a page.

A screenshot of a web browser window displaying a page titled "CLIENT TECHNOLOGY SUPPORT (CTS)". The page contains a sidebar with links like "Computer Labs", "Usage Policies", "Help", "Report a Problem", and "Contact". Below the sidebar is a table showing computer lab locations, hours, software, and phone numbers. At the top of the page, there is a toolbar with several icons: a folder, a preview button, an edit button (highlighted with a red arrow), a properties button, a versions button, a lightbulb icon, a publish button, and a question mark icon. A green button labeled "Main Content" is also visible above the table. The browser's address bar shows the URL: a.cms.omniupdate.com/10/#oucampus/uga/eits/previewedit%2Fsupport%2Fcts%2Fcomputer_labs.pdf. The status bar at the bottom shows the date and time: "Wed 1:29 PM".

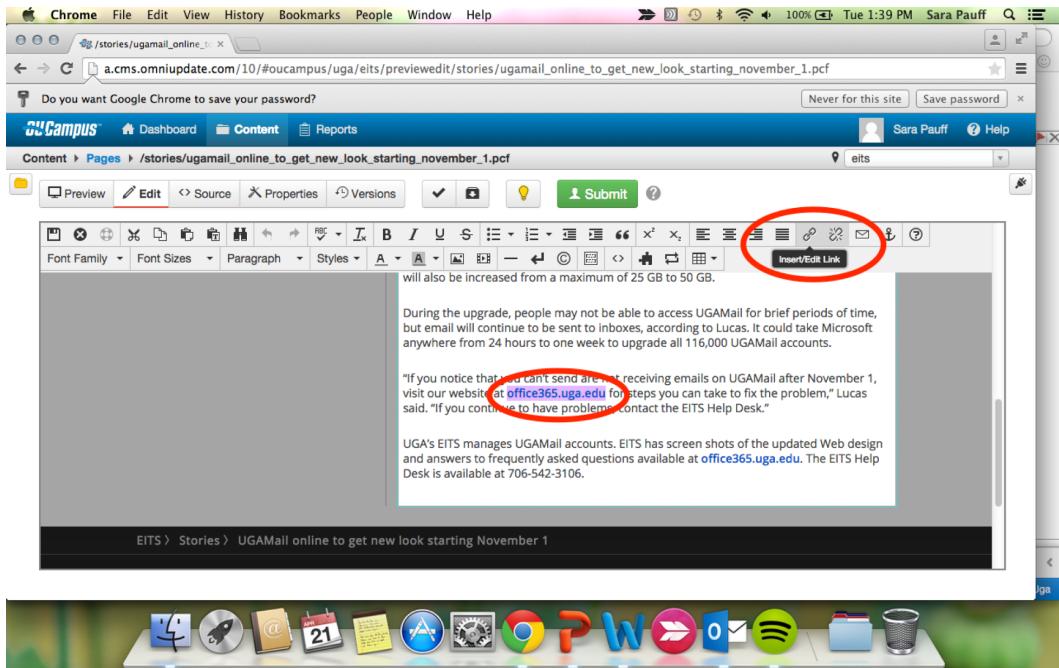
The **editing toolbar** is similar to one you might find in Microsoft Word, with a few extras. You should have options for cut, copy and paste; making text bold and changing the alignment of text; changing the paragraph styles; inserting links; inserting tables; and inserting pictures and video.

You also see an option for changing the form of the text, creating headings, paragraphs and block quotes.

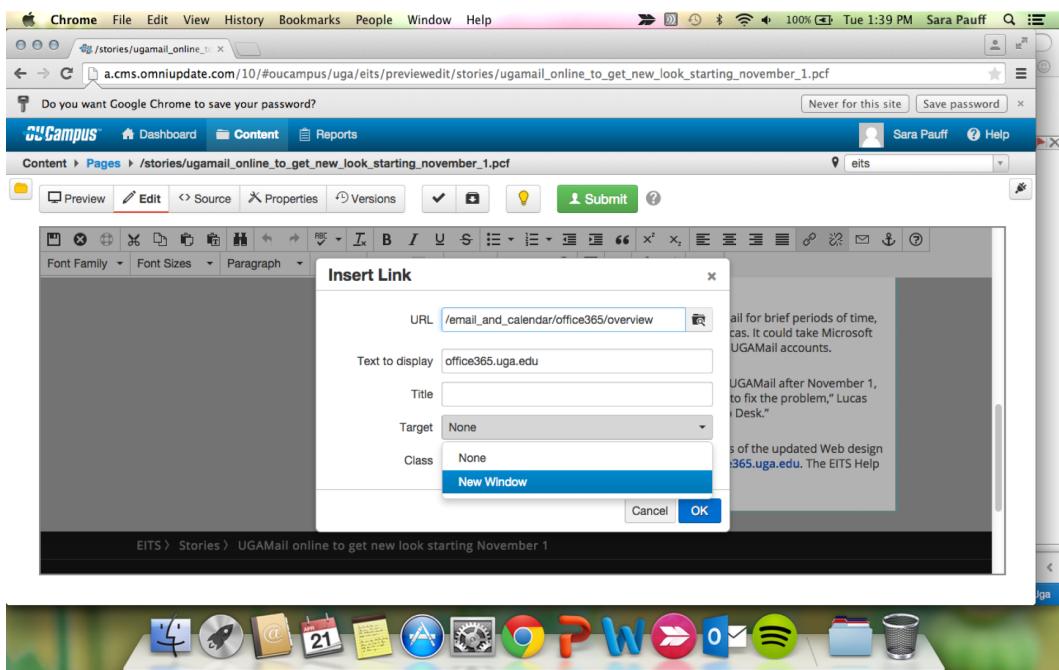
A screenshot of a web browser window displaying the same "CLIENT TECHNOLOGY SUPPORT (CTS)" page as the previous image. The toolbar is now highlighted with a large red box. It includes standard Microsoft Word-style buttons for font family, font size, bold, italic, underline, alignment, and lists. Below the toolbar is a search bar with the placeholder "Google Custom Search" and a "Search" button. The rest of the page content is identical to the first screenshot, including the sidebar, table, and status bar.

Inserting and Editing a Text Link

To insert a link in the text of a page, highlight the text you want to make a link and **click on the link icon** in the toolbar.

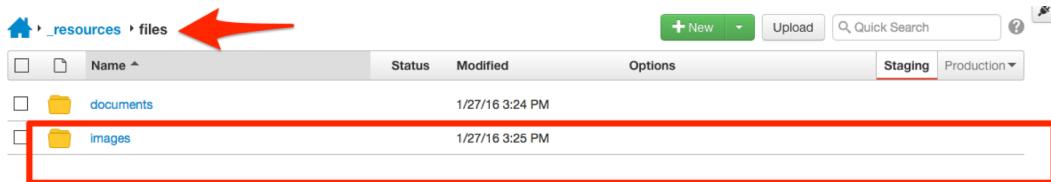


This will bring up a window for you to type in the link. You can also select the text to display and whether you want the link to open in a new window.

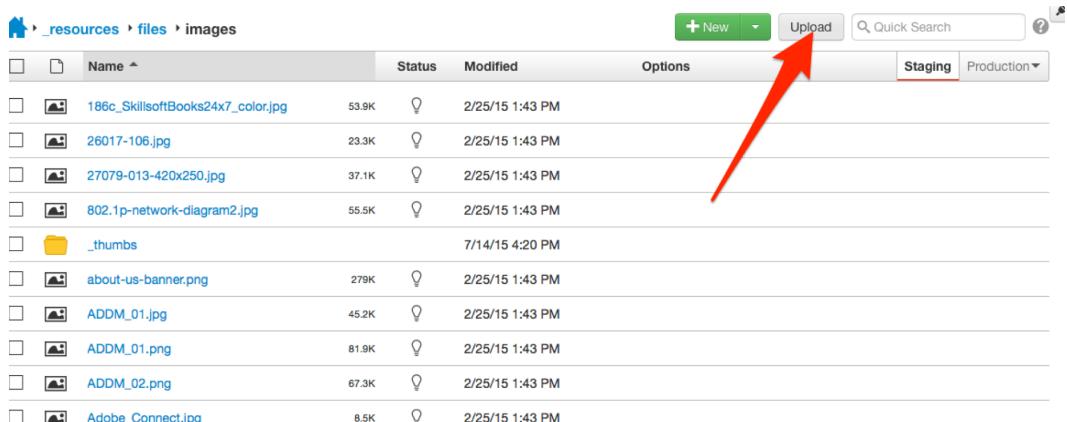


Inserting an Image

To insert an image, you must **first upload the image to the Images folder** in OmniUpdate. You can find the Images folder by clicking on the **_resources folder**, then on **files**, then **images**.



Click on the images folder to open it, then click on the **Upload** button in the upper right hand corner.



From there, select **Edit and Upload Image**. You can either click the **green Add** button to add files or simply drag them from your desktop. Then click the **blue Start Upload** button in the bottom right corner.

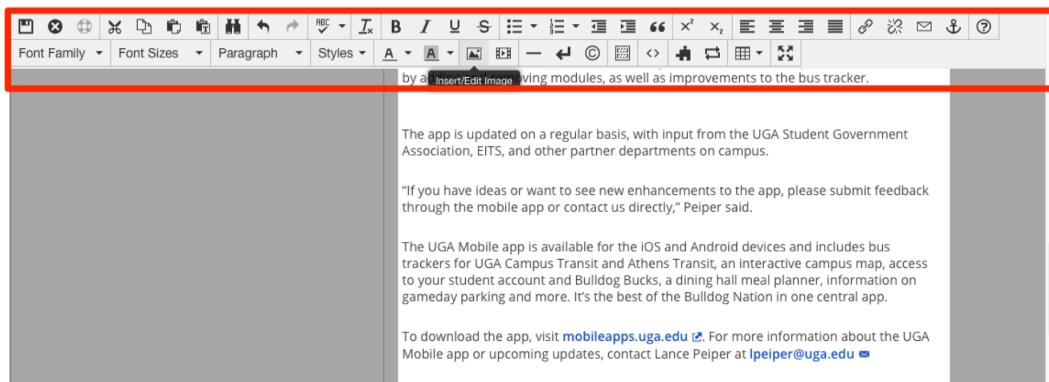
This screenshot shows the 'Edit and Upload Image' dialog. It has a title 'Upload to /_resources/files/images'. Below it is a 'Type' section with two radio buttons: 'Upload Files' (unchecked) and 'Edit and Upload Image' (checked). There's also an 'Access Group' dropdown set to '(Inherit Existing)'. Under 'Files', there's a '+ Add' button and a placeholder 'or drag files from desktop'. At the bottom are 'Cancel' and 'Start Upload' buttons.

Once the image has been uploaded, this screen will appear, which will **allow you to Resize, Crop, Rotate and Zoom In on your Image** if you wish. Once you have finished making changes to the image, be sure to click the **blue Save** button at the bottom of the screen, or your changes will be lost.



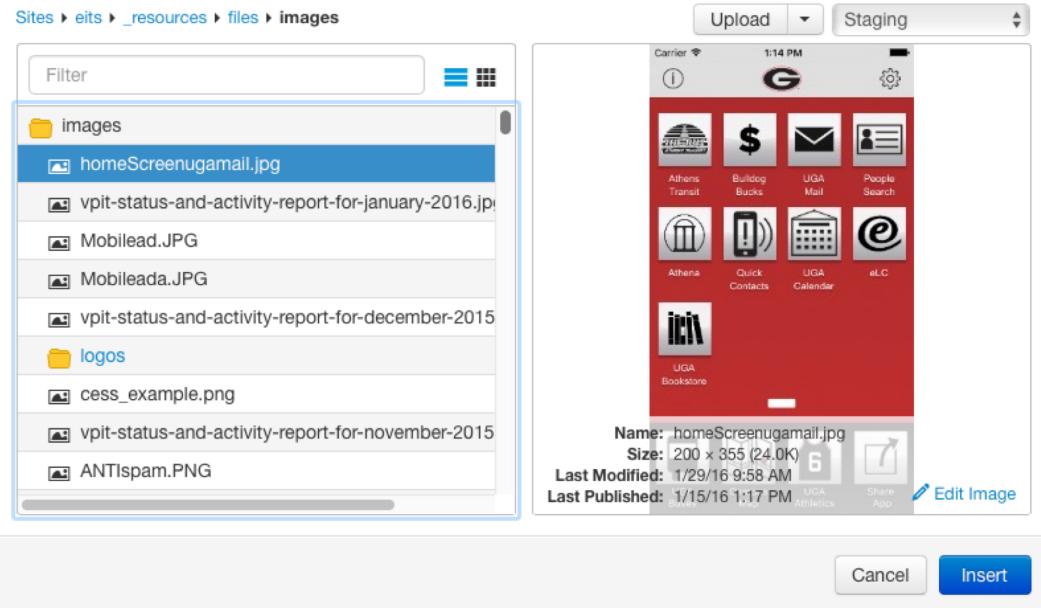
A new screen will pop up, showing you your image. From there, you can go back to the page you were editing (using the OmniUpdate file structure) and place the image on the page.

To place the image on the page, open the page you wish to edit and click on the **green Edit button** to open the editing window. Click on the **photo icon** to place the image on the page.

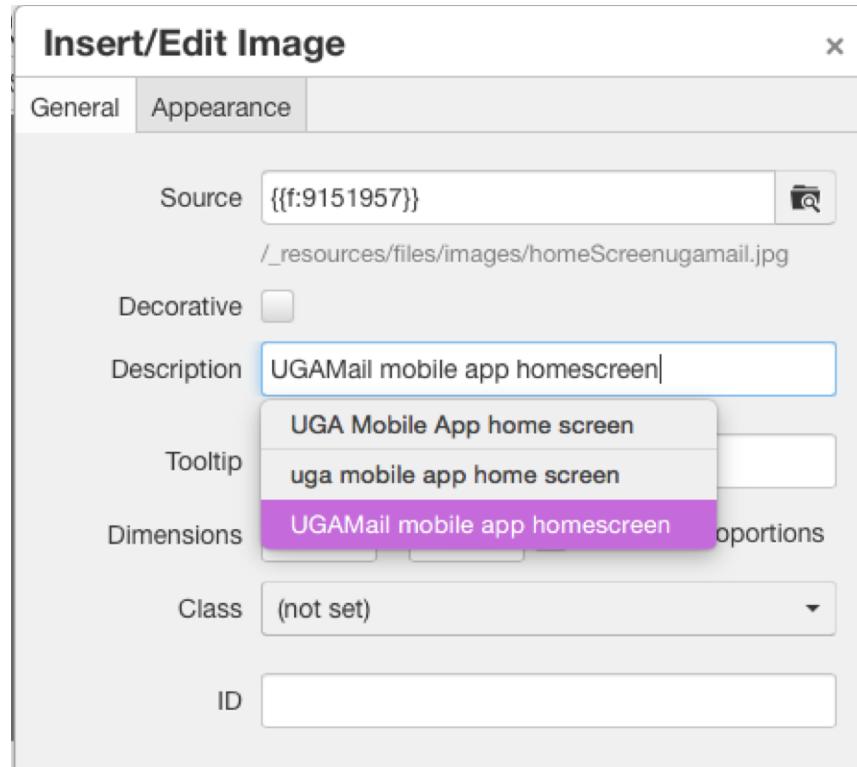


This will open up a window for you to search for the image in the OmniUpdate file structure. The most recently-edited image should appear at the top.

Select Image



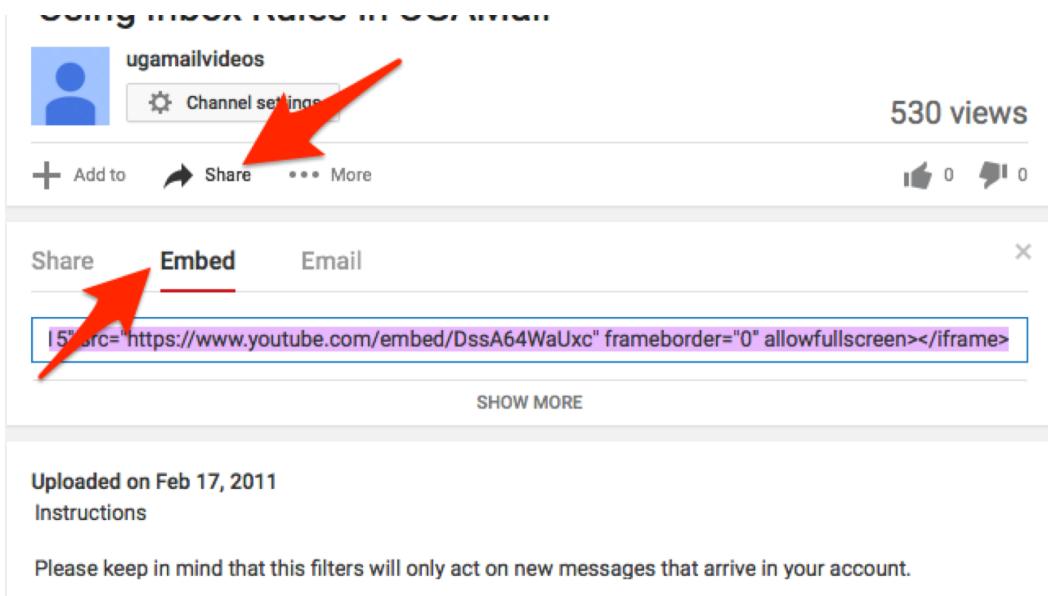
Click **Insert** to add the selected image to a page. You can also **choose the alignment for an image**. Make sure you **put in descriptive text** as well, so that the page meets web accessibility guidelines.



Once you click the **blue OK** button, the image will be inserted on the page. From there, you can move the image around and resize it.

Inserting Video

To insert a video from YouTube, Vimeo or other online video service, you must **first have the embed code**. You can easily find this, **usually under the Share option on the video**.



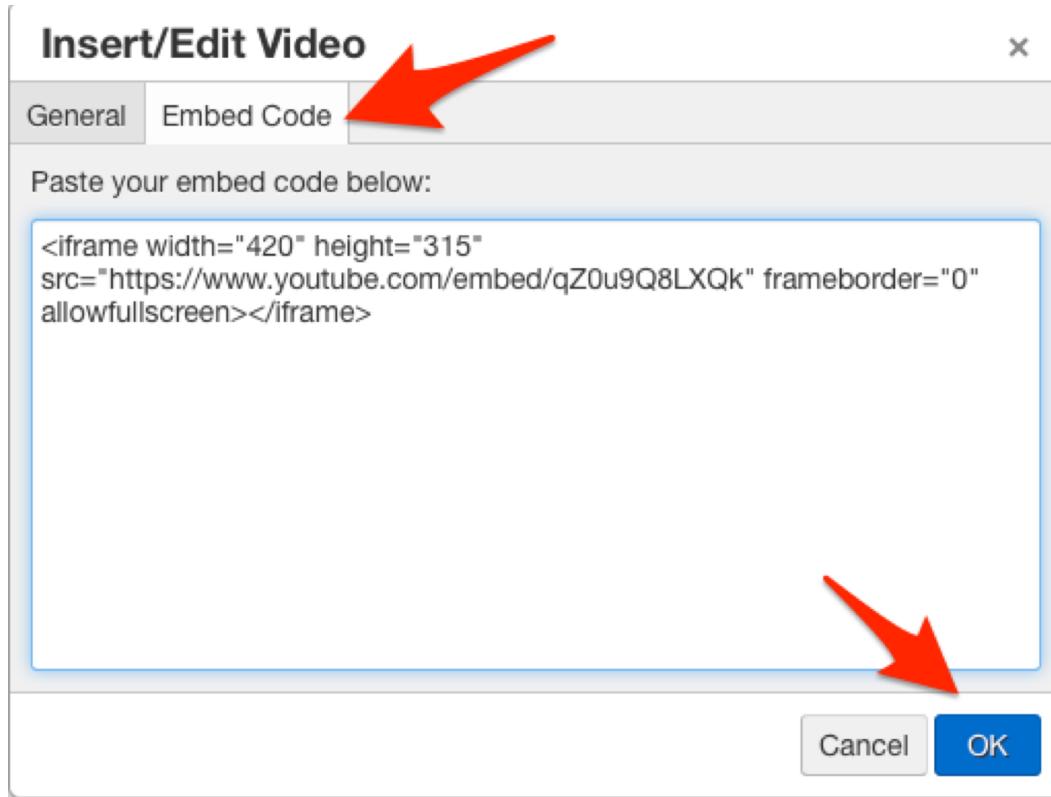
Copy the embed code, then go to the page you wish to edit in OmniUpdate.

The **Insert Video** button is right next to the Insert Image button in the editing window.



If you click on Insert Video, it should open another window. Click on the **Embed Code tab**, and paste your videos embed code in the box. Click the **blue OK** button in the bottom right corner of the window.

The video will not appear until you save and publish the page.



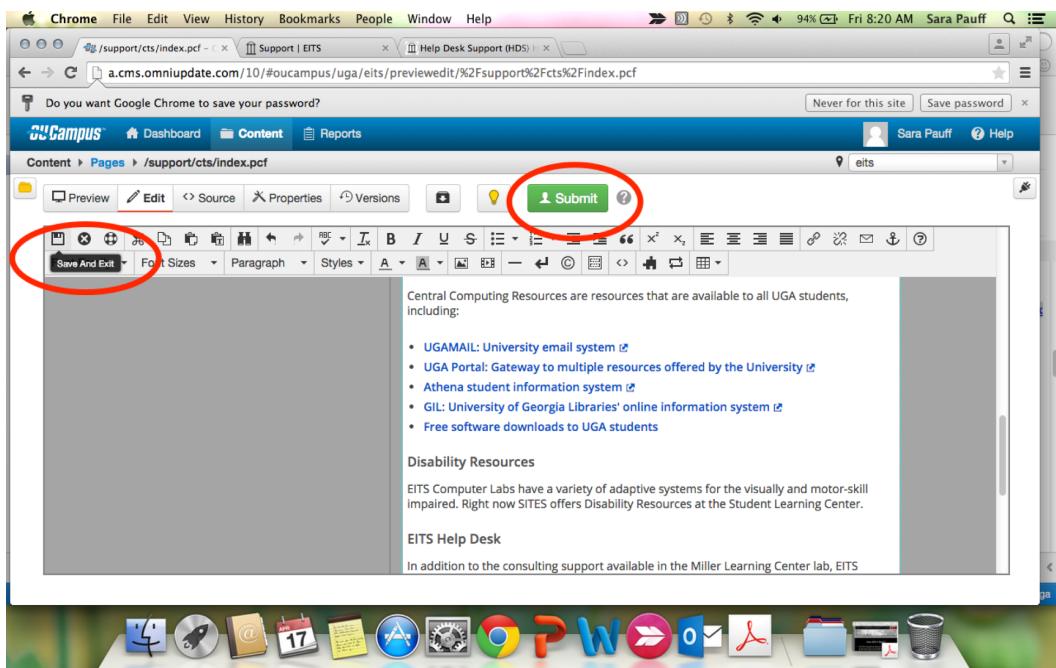
Publishing an Edited Page

After you have made changes on your page, **remember to hit save** and exit in the top left hand corner of the toolbar. **If you do not save, your changes will be lost.**

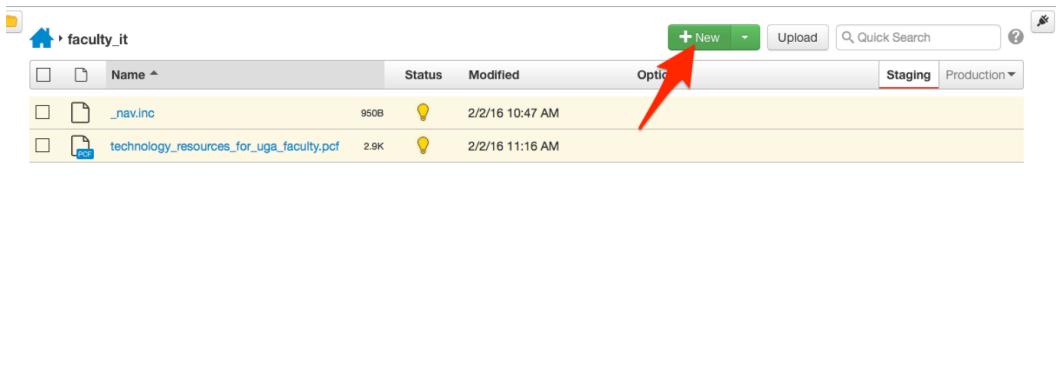
If your settings allow you to edit and create content but not publish it, **you will have to submit the page for approval before publishing.** At the top of the page, instead of the **Publish** button, you should see a large **green** button that says **Submit**. Click this and it will open up a window for you to submit the page to an assigned approver in the system. That approver (an individual in your organization) can review the page and publish it, or choose to send it back to you to make more edits.

The page is now locked by your approver and cannot be accessed by you until they either publish it or send it back to you.

If you are allowed to publish pages, you will see a **green Publish** button. Clicking this button will publish the page.

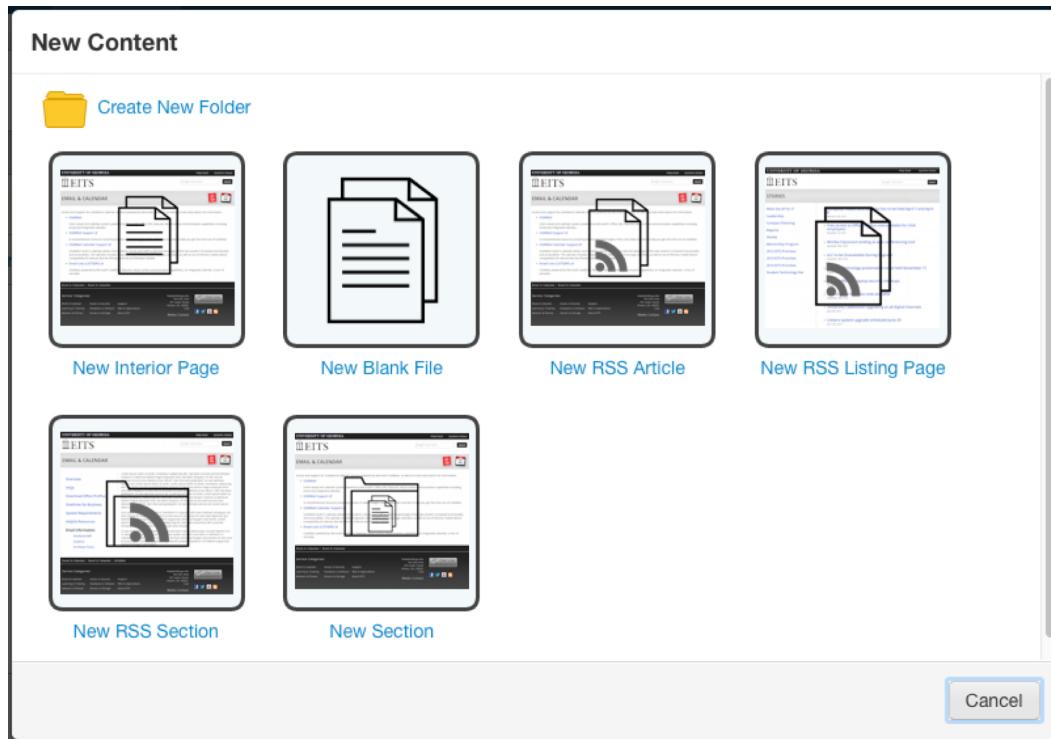


Creating a New Page



To create a new page, first find and open the section folder you wish the page to go under. Then click the **green New** button to create a new page.

This will open a new window with options for the page. Most of the time you will select the option to create a **New Page** or **New Interior Page**.



Selecting an option will open another window, where you can fill out basic page information, including a **Page Breadcrumb**, which will be **used to calculate the page title and a file name, which will be displayed in the web address. The filename should be the same as the page title, but only use lowercase letters, underscores or dashes**.

The screenshot shows the 'New Page' dialog box with the following fields:

- Page Breadcrumb**: A text input field containing "Getting Started". A red arrow points to this field.
- Displayed above the footer. Used to calculate page title.**: A descriptive text below the breadcrumb field.
- Filename**: A text input field containing "getting_started".
- Enter a filename using only lowercase letters, underscores, or dashes**: A descriptive text below the filename field.
- Page Options**: A section with a dropdown menu for "Access Group" set to "(Inherit from Parent)".
- Specify the group with rights to edit this file.**: A descriptive text below the access group dropdown.
- Cancel** and **Create** buttons at the bottom right.

Leave the **Access Group** to "Inherit from Parent", unless you wish for other groups beside your own to have access to editing rights. Click the **blue Create** button in the bottom right corner of the window..

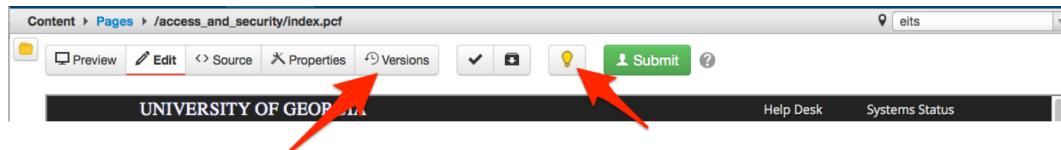
This will take you back to the list of pages under that folder. From there, you can begin editing your newly created page.

Versioning

OmniUpdate's versioning feature allows you to revert to an older version of a page at any time. "Reverting" the content of a page will replace the current content with the older content.

To view an older published versions of a page, you must first check the page out by **clicking the lightbulb** icon at the top of the page.

This will give you access to view all the past published versions of a page. Access it by clicking the **Versions** button in the grey toolbar at the top of the page.



From here, you can view the older page or compare it to the current page.

A screenshot of the OmniUpdate interface showing the 'Versions' table. The table has columns for Version, Date, User, Description, and Options. A red arrow points to the 'Options' column for the row where the version was 'Live on publish target: eits'. Another red arrow points to a context menu that appears when hovering over the 'Compare' link in the 'Options' column. The context menu includes options for 'View', 'Compare', and 'Revert'. The 'Compare' option is highlighted.

When you compare versions, any changes made to the page will appear in red, for deletions, and green for additions.

Content > Pages > /access_and_security/index.pcf

Version Compare

Comparing current staging version to Version 8 from 4/17/15 1:23 PM.

Go to version: 8 Page Source

- Athena**
- Virus Protection**
- Protect Your Computer**
- Usage Policies**
- Secure UGA**

The Office of Information Security maintains several policies related to the use of computers and information at the University of Georgia.

SecureUGA is the University of Georgia's information security awareness and training program. This program supports the University's role-based security training and accountability model in which every individual, regardless of position, has a responsibility to protect our

You can also revert to an older version of the page from the currently published version.

Version	Date	User	Description	Options
12	12/24/15 11:23 AM	uga	12/24/15	
11(Live)	7/29/15 3:17 PM	Kerri Testement	Live on publish target: eits	Revert
10	7/29/15 3:07 PM	Kerri Testement	Added ID Federation subsection	View Compare
9	7/1/15 3:08 PM	Kerri Testement		View Compare
8	4/17/15 12:23 PM	Bryan Chasteen		View Compare
7	3/30/15 12:19 PM	Bryan Chasteen		View Compare
6	3/27/15 7:51 AM	Bryan Chasteen		View Compare
5	3/25/15 5:33 PM	Bryan Chasteen		View Compare
4	3/25/15 5:24 PM	Bryan Chasteen		View Compare

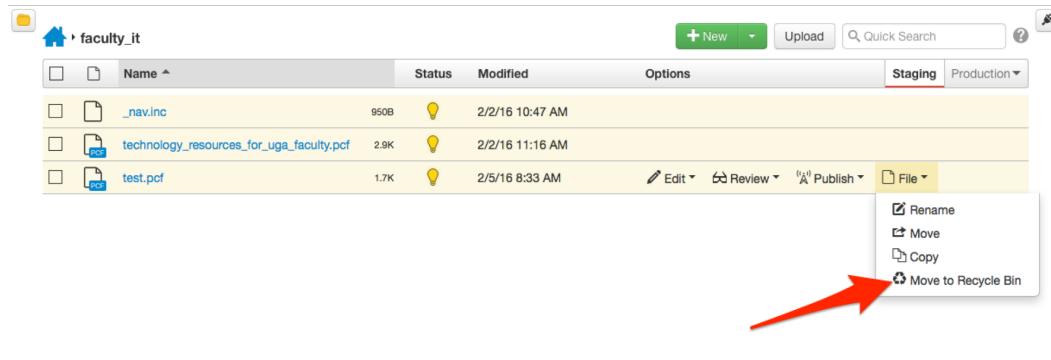
Show 100 ▾

Deleting a Page

Only site administrators can delete pages; editors and content creators cannot.

However, editors and content creators do have the option of moving a page to the **Recycle Bin**, so that the page does not appear on the published site.

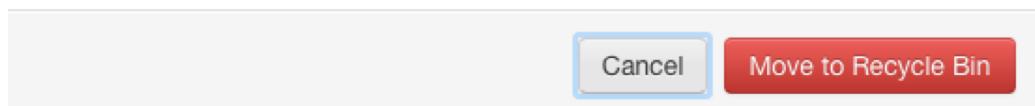
To move a page to the **Recycle Bin**, hover over the page name in the list of files. If you go to **File**, you will see options to **Rename** the page, **Move** the page to a different folder, **Copy** the page or **Move** to the Recycle Bin.



Click **Move to Recycle Bin**. A new window will pop up asking you to confirm that you want to move the page to the Recycle Bin. Click the **red Move to Recycle Bin** button to confirm.

Move test.pcf to Recycle Bin

Are you sure you want to move **test.pcf** to the Recycle Bin? **Derivative files on the production server will be permanently deleted.**



If you wish to retrieve a page from the Recycle Bin, contact your site administrator.

Understanding Snippets and Assets

OmniUpdate includes two methods for inserting reusable content - Snippets and Assets. Both can help you save time while developing your site and ensure quality and consistency throughout.

A **Snippet** is a small piece of text (or code) that can be inserted on any page. The snippet can then be edited to fit your needs on the page you inserted it. This is very similar to copying and pasting a piece of content you use frequently. Snippets are typically used for repeated elements, like faculty or staff profiles, or something as simple as an address.

An **Asset** is similar to a Snippet, but editing it in one location will edit it on all pages the Asset appears. Assets might be used for a contact form that appears on various page of a site. One edit to the Asset will automatically update and publish all of the "subscribing" pages that contain it.

Should you use a Snippet or an Asset? If the content should be exactly the same on every page it appears, an Asset may be best. If you might want to personalize the content on every page it appears, a Snippet should do the trick.

Snippets and Assets can be created and edited by your site administrators.

Inserting a Snippet

The option to insert a Snippet appears in the editing toolbar.



Choose the Snippet you would like to insert from the options on the left and click the **blue Insert** button in the bottom right corner of the window. The Snippet can then be edited like any other piece of content.

A screenshot of a WYSIWYG editor interface. On the left, there is a sidebar with sections for 'Welcome!', 'EVENTS & ANNOUNCEMENTS' (which contains a message about a toggle menu), and 'QUICKLINKS' (with links to 'Contact', 'Events Calendar', and 'Meet our Staff'). The main content area shows a snippet being inserted. The snippet has a title 'ITEM ONE' and a link 'Contents'. Below it, another snippet is shown with a title 'ITEM TWO' and a link 'Contents'. The entire snippet area is surrounded by a dashed border, indicating it is selected or being edited.

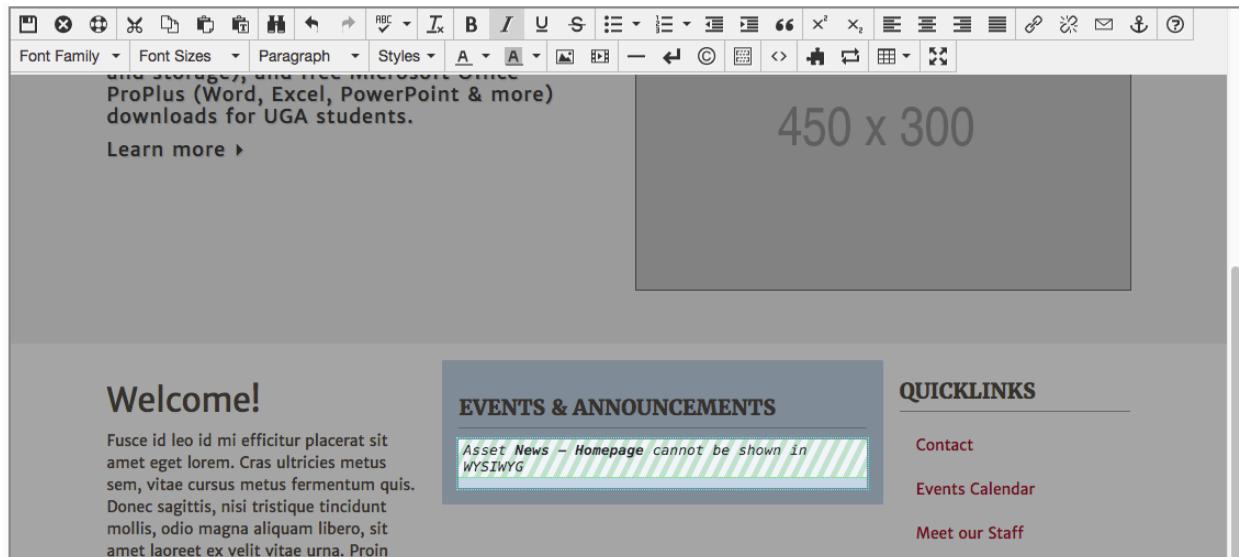
Inserting an Asset

The option to insert an Asset appears in the editing toolbar.



Choose the Asset you would like to insert from the option on the left and click the **blue Insert** button in the bottom right corner of the window. The Asset will show a message warning you that the contents cannot be viewed in the WYSIWYG (What You See Is What You Get) editor. To view the Asset in place, you will have to save your changes and view the page first.

Assets can be edited by clicking on Content and then Assets at the top of the window. Depending on your access level, you may not have the ability to see this option or make changes to an Asset. In this case, partner with your site administrator to make changes.



Please note:

Editing an Asset will change its appearance on all pages that it appears. If this is not acceptable, please partner with your site administrator to turn your Asset into a Snippet. Unlike Assets, Snippets can be inserted and edited on individual pages without influencing the other instances of the Snippet.

Frequently Asked Questions

Your access to the items listed below is contingent on your access level. If you find that the options highlighted below are not available to you, partner with your site administrator to accomplish these tasks.

These directions seem pretty basic. How do I perform tasks that are specific to my site?

This guide is typically accompanied by a guide that details specific processes for your site. This file will typically be e-mailed to you or may be stored in the /_training/ folder on your site. You may also obtain the guide of specific instructions for your site by contacting your site administrator.

What does it mean if I cannot interact with a file, folder, page, or content on a page?

If a page, file, or folder appears as standard text rather than a link, you do not have access to interact with the item. Partner with your site administrator to make changes to these items. Content in the header and footer of the site can only be edited by site administrators and may be subject to approval.

What does it mean if a file or page I want to work with has a red lock icon on it?

OmniUpdate uses a check-in/check-out system to prevent multiple users from trying to edit a page at once. This file is locked by another user who may be currently editing the page or who forgot to check it back in. You may contact the site administrator or the user directly to unlock the file.

How do I retrieve something I deleted?

Click on **Content** and then **Recycle Bin** in the blue toolbar at the top of the page. Hover your mouse over the file you want to retrieve and click on **Restore**. You may need to partner with a site administrator to complete this task, depending on your access level.

How can I directly edit the code of these pages?

You can edit the HTML on your page directly by clicking on the <> icon in the second row of the editing toolbar.

