# Southeast Web Editor Training Reference Materials

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## Overview & Quick Reference

- The Open Text content management system is the software which contains the university's primary web presence. Departmental editors modify offline copies of the live content, which allows changes to be made and reviewed by a team before revisions reach the audience.
    - Open Text Login (http://cmsserver.semo.edu ) Log-in using your Southeast Key
- The Open Text software runs inside your browser, so there is no additional software to install. However, if the server asks for authorization or you receive a warning that Open Text is trying to install a web application, it is safe to proceed.
- All major browsers are officially supported by Open Text, however confirmed problems exist with all versions of Internet Explorer. We recommend using either Google Chrome or Mozilla Firefox to avoid known software conflictions. Mac users can use Safari.
- Since Open Text runs inside of the browser, it is important to keep your session active in order to continue editing. If you type a different web URL in the address bar, your session will be lost and you will likely need to log in again. It is also important to avoid using the Back/Forward or refresh functions as this will also likely interrupt your session. Everything you need to do in order to work inside of Open Text is provided in some way within Open Text.
- Reference materials are provided on The Office of Web Design & Support homepage
    - This Document (http://www.semo.edu/pdf/WDS_Training-OpenTextReference.pdf)
    - WDS Reference Homepage (http://www.semo.edu/wds/reference/)
    - Smart Edit User's Guide (http://www.semo.edu/pdf/RedDot_10.1_User_Manual.pdf )
- The Office of Web Design & Support maintains a ticketing system to respond to requests
    - The Web Q Login (http://wds.semo.edu/help). Log in using your Southeast Key.

## Getting Started

1. Log in to the Open Text server: http://cmsserver.semo.edu using your Southeast Key.
    a. After logging in, the 'Homepage' tab is displayed. Customization of the panels shown on this page is possible using the 'Configure Homepage' button located in the upper right-hand corner, though this is not necessary.
2. On the far right of the page near the top, under the search prompt, click the 'Select Project' button and choose 'semo.edu'. New tabs should now be available next to the 'Homepage' tab.
    a. If this doesn't take the first time (it usually won't), repeat until a green check mark appears next to 'semo.edu'.
3. Click the 'SmartEdit' tab to access the main editing functions of Open Text. This should take you to your department's page.

## Smart Edit Mode

This is the interface that allows you to interact with and modify content of pages held within Open Text. It essentially displays a copy of the Southeast website and provided access to content through editing 'dots'. Users will only be able to make changes to content for which you have been authorized.

- A number of red dots can be seen in various places near the contents of the page. These dots indicate the location of content that can accessed for editing.
- On any given page, there will usually be a red dot with an arrow pointing down and right inside of it labeled '**[Expand Content Editing Options]**'. This indicates a 'container' that can be expanded for further editing. Generally speaking, the red dot will always be closest to the content it references.
    a. Clicking 'Expand Content Editing Options' reveals a 'Collapse Content Editing Options', which does what you would expect, and an 'Edit Content' red dot which will open the text editor. (more on this in a moment)
        i. Ctrl+left-clicking on the content dot enables '**Direct Edit Mode**' for quick text revisions. Make changes to the text directly from this page, then click the red dot with a checkmark icon inside to apply the changes. Press escape to leave direct edit mode.
    b. A green dotted outline typically appears, showing the extremities of the content that can be edited within this expanded content field. Any items external to this green box must be edited elsewhere.
- Most pages will also have a red dot labeled '[Expand Base Page Editing Options]', which will allow you to modify the '**Page Teaser**' field for that page. This is the text that displays after a dynamically generated link to that page, and is used to give a brief description of the page contents or purpose.  If you see text displayed after a link that you can't figure out how to edit, it's probably a page teaser.
- In addition to the interactive red dot icons, there are a number of icons floating in panel to the right. The only one you'll use is the third one labeled '**Clipboard**'.
    a. The clipboard makes it easy to get around inside OpenText, which is useful if you edit more than one site or would simply like to create quick references to regularly updated pages.
        i. There are a few ways to add new items to the clipboard, including:
            1. After the page content has been expanded for editing, right click within the content and select 'Create Shortcut in Clipboard'
            2. Using the search tab to locate a page will add a link to the clipboard (more on this later)
            3. Using the search prompt visible while still on the Smart Edit tab (located in the upper right-hand corner after the 'Log Off' button) will also create a link within the clipboard. Shorthand search using the page ID is most affective, and follows the syntax: 'id: 12345' (without the 's). More on page IDs later.
    b. Once pages have been added to the clipboard, click the blue arrow icon next to the page in the list to open that page in SmartEdit. Icons above the clipboard page list allow you to refresh, select/deselect all, and remove items from the clipboard.
- To toggle the display of these panels, click the clipboard icon within the panel to collapse/expand it. To hide the panel completely, click the 'Hide/Display Panels' button just under the 'Setting, Help, and Logoff' links in the upper right-hand corner of the page.
- Near the previously mentioned 'Search' box is a 'Settings' link. Click 'Settings', then 'User Settings' to display a set of options for your user account. Here you can change your name, email address,

department (in the 'Description' field), and can also **change the assigned Text Editor**. Your password is tired to you SE Key account on the IT servers, and cannot be modified here.

   a. You can change the active text using the 'preferred text editor' drop-down menu. The default editor (labeled project default) is tinyMCE, which is preferred for functionality. However, in certain circumstances you may need to use the 'Telerik Rad Editor'. (More on this later.) No other text editor displayed in this list should be used.

## Editing Content

1. To access the **text editor**, click the empty red dot that appears closest to the content you want to change after the [Expand Content Editing Options] dot has been expanded.
2. A new window will appear containing the text editor and contents of the element you chose to edit. Depending on the currently selected text editor, the toolbar displayed at the top may vary, but most of the tools are similar to other word processing programs such as Microsoft Word.

### Important Guidelines and Tips for Editing Content in Open Text

- **Text-Formatting** is intentionally limited to keep pages consistent with university brand and style guide. Proper use of the formatting tools is necessary to provide proper flow of you content on the page. In the text editor toolbar, there will be two drop-down menus that offer text formatting styles . As you move your cursor around in the editor, you will notice the text displayed in these drop-down menus changing to reflect the currently applied style at the cursor's location. The following menus are present:
    - **Font Styles (CSS Styles)**
        - These are only available in the text editor **for legacy display purposes**, and should not be used for further formatting. The styles that may appear are labeled Headline, Subhead, Pagelinks, BodyText, and SpotlightTeaserText. Though these styles are set to display relatively the same as the Font Format (Paragraph Styles), they do not register as a structural element to the browser, and so will not contribute to the page outline. Do not use.
    - **Font Format (Paragraph Styles)**
        - These are the correct formatting styles for text. They follow a hierarchal structure, beginning with Heading 3 (H3), down through Heading 6 (H6), then Paragraph. (H1 & H2 are reserved by the site-wide header) In addition to creating a clean visual structure for the page, formatting content this way also develops a structural outline of the page

  The '**Unformat' ('Remove Formatting')** button will strip all formatting from the selected content. Sometimes, clearing all old formatting and starting over is the quickest route to clean up a poorly formatted page.

- **Selecting text** with your mouse often results in an overlapping selection of whitespace, which can cause formatting confusion for any text editor, and in our circumstance will likely create nested formatting tags. For this reason, it's best to use the Shift key combined with the <- or -> arrow keys to make a text selection. Holding the Shift key while moving the arrows will allow you to control each individual character in the selection, and will result in cleaner formatting.

- **Line Breaks** matter. How do they differ, and how/when should they be used? The following is a list of commands and an explanation of results.
    - **'Enter' = New Paragraph (double space)**
        - Each new paragraph should begin with a single 'Enter' key, which will produce a double space.
    - **Shift+Enter = Line Break (single space)**
        - Avoid using line breaks to separate paragraphs; follow the rule for paragraphs above. Line breaks should be used for content that belongs within an individual paragraph block but requires visual separation.
    - **(Shift+Enter) + (Shift+Enter) *does not* = New Paragraph**
        - Two line breaks next to each other may look the same as a paragraph break, but are treated differently by the browser.
            - **To test this**, place your cursor at the beginning of a paragraph, and press the left arrow key. If your cursor jumped up to the end of the previous paragraph, the paragraph break was used correctly. If it went to the blank line between paragraphs, simply backspace the beginning of the new paragraph up the end of the previous paragraph, and press the 'Enter' key for a proper double space.
- **Bullets & Lists**
    - **Ordered (Numerical/Alphabetical) Lists** should only be used for items that must be listed in a particular logical sequence. If the order of the items being listed does not matter and could be randomized, you should use an **Unordered (Bulleted) List**.

- **Tables** have a history in web design as a structural element, but new standards require that they only be used to contain and structure *tabular data*. Basically, this means content should only be placed into a table if it could be otherwise structured within an Excel spreadsheet. *Tables should not be used to structure images or paragraphs.*

- **Links** can be created to reference a number of different things, but regardless of the target it is important to consider what text is appropriate for the link. Avoid phrasing like 'Click here to access the application', as the link provides no information to the reader at a glance,. Instead, try to incorporate the file description or name into the link, like this: 'Prospective international students can apply to Southeast by submitting a copy of the International Student Application for Admissions to our office.'

  To create a new link, carefully highlight text to use for the link and click the 'Insert/Edit Link' button. The type of link you're wanting to create will determine what to do next:

  - **To create a link to an external website,** simply type the entire web address (including http://) into the 'Link URL' field. This is how you will link to any page that does not begin with www.semo.edu. Click 'Insert' to create the link.

  - **To create a link to an internal website** that is contained within www.semo.edu (this is anything that is within Open Text), you'll click the 'Reference Page' link and a page will open with search options. Near the bottom is a drop-down menu labeled 'Page ID' with a green plus icon next to it. Click the green plus, and a new field will appear that will accept the page ID for the desired page.
    - **To locate the page ID for any page**, look in the footer of that page. Different templates display the page ID in a variety of locations, but it is always near the copyright information.

    Enter the page ID for the desired page, and click the 'Start' button in the bottom-right of the window. Your search should return only one result, as each page has its own unique ID . Click on the headline link for the page to select it. If done properly, the 'Insert/Edit Link' window will reappear with '[ioID]' string listed in the Link URL (default text editor), or in Telerik Rad Editor, the page headline will be displayed instead.

  - **To create a link to a PDF or other document**, click the 'Asset Managers' tab, and select the '_Media – PDF & Documents' gallery from the Asset Managers drop-down menu. Click 'Browse Server'.
- **Images** can be inserted into the content of your page by clicking the 'Insert/Edit Image' button. A new window appears, which will display as follows depending on the current text editor:
  - In the default text editor (tinyMCE),click the 'Asset Managers' tab at the very top-right of the new window. Select '_Media – Images' from the Asset Managers drop-down menu, and click 'Browse Server' button.
  - In Telerik Rad Editor, click the 'Select' button next to the field labeled 'File:'. Then, click 'Select Asset from Media Gallery', and select '_Media – Images' from the list, and click 'Ok'.

  Now, you should be looking at the '_Media – Images' media gallery.

  1. Select the photo you wish to use by clicking the file name. (Clicking the thumbnail will open a preview of the image).
  2. After selecting the image, details will appear in the panel to the right.
  3. Click 'Ok' to accept the currently selected image as the one you wish to place on the page.

4. Before closing the final window, fill out the 'Image Description' ('A*lternate Text' in Telerik Rad Editor*) field with a description of the photo. Click 'Ok' again to close the remaining window, and the selected image will appear on the page.

- Save your changes before closing the text editor by clicking the 'Save' disk icon in the toolbar. (default editor, tinyMCE). For Telerik Rad Editor, click the 'Save' button to save and continue editing, or click the 'Ok' button to save and close the editor. Closing the window without saving will cancel your edits.

## The Asset Manager (Media Galleries)

The Asset Manager holds all of the media available for Southeast web editors including images, PDFs, and various other documents. All media to be placed into the media galleries must be processed by someone in the Office of Web Design & Support. Media should be submitted through the Web Q, (more on this later). To navigate the Asset Manager, use the following tips:

- Asset Manager can be accessed by clicking the 'Asset Manager' tab in Open Text, just to the right of the 'SmartEdit' tab. It is also opened each time you attempt to link content from the text editor to a document, or embed an image on the page.
- Click the Forward/Previous links to navigate through the currently display content.
- Files are named following a convention, beginning with the department prefix, followed by a description of the image or document, and finally followed by the year uploaded (images only).
- Files from all departments are loaded into the two main galleries, resulting in multiple pages of content.
- To refine the results displayed in the asset manager, use the search field.
    - The asterisk character (*) acts as a 'wildcard' in the search field, meaning it can represent any string of characters. You can use this in combination with portions of the file name such as the department prefix to locate files with similar names. The search is verbatim, so searching without using wildcards requires the exact file name, including file extension. (.jpg, .pdf, etc.)
        - Examples
            - Search query 'art*' will display all files in the gallery that begin with 'art' and end with anything else.
            - Search query 'art*pdf' will display all files that begin with art, that end with the 'pdf' extension.
            - Search query 'art*faculty*' will display all files that begin with art, and have the word 'faculty' afterwards at some point.
- Click the 'List' or 'Thumbnail' links near the top to change the display style for the gallery.
- Click a file thumbnail to open the preview in a separate window.
- Click the file name to select it and view details.
- If linking to a file or inserting an image, click 'Ok' after selecting a file to accept that file for the current action.

## Workflow

Pages edited in Open Text are processed through a workflow by the Office of Web Design & Support before they are published to the live server. This process helps ensure quality and consistency in published pages, and provides a level of quality control needed for a project as large and diverse as the Southeast website. It also serves as a version control system, so *it's important to note that any editor who has a page open for editing or saved as a draft is the only person who can make changes to that page until it has been submitted to the workflow, or released by undoing the changes.* Workflow submissions are often processed multiple times each workday, but are always processed at 5pm M-F. There are different ways to work with items in the workflow:

- Using the **Tasks Page**
    1. Click the 'Tasks' tab in Open Text, located between 'Asset Manager' and 'Search'
    2. In the left-hand menu, click expand the 'My Pages' menu item.
    3. A value representing the number of pages you have been working on will be displayed next to the 'Pages Saved as Draft' item. To view your draft pages, expand 'Pages Saved as Draft' and select 'English'.
    4. Click on an item displayed in the main panel to see a preview of that page in the lower panel. You can also make additional changes to the content from the lower panel.
    5. Right click on a page listed in the main panel to access the 'Action Menu'. From here, you can 'Submit to Workflow', 'Undo Changes'. You can also 'Create Shortcut in Clipboard' from here as well if it's a page you plan on editing regularly.
        - **Submit to Workflow** will submit the page for review by the Office of Web Design & Support. After the page has been approved, it will usually publish within 5 minutes. Due to the volume of content that must be processed each day, please note that we are unable to vet for grammatical or contextual information. *The content for each page should be reviewed and finalized before submitting it to the workflow.*
        - **Undo Changes**, as the name implies, will undo all changes made to the page since the last user began editing the content. Only do this if you made changes you do not want to keep, or would like to start over.
    6. After a page has been submitted to workflow, it has become visible to the Office of Web Design & Support for review and release. You can view you pages currently awaiting review by expanding the 'My Pages in Workflow' menu item and again click 'English'. Your pages currently in the workflow are displayed in the main panel on the right. *Note: A display bug in Open Text prevents the left-hand menu from updating when a page moves in and out of the workflow, so often you will not see anything in 'My Pages in Workflow' until after the 'Tasks' page has been refreshed. Click the 'Tasks' tab again to update the menu, and your item should appear in this location.*
    7. To remove an item from the workflow in order to fix a mistake or continue making edits, right click on the item in the main panel and select 'Reset Page to Draft Status'. This will remove the item from the workflow and place it back into 'Pages Saved as Draft' for further editing.
    8. You can also use the checkboxes next to items listed in the main window to perform right-click actions to multiple pages at once. Right-clicking on an item also provides 'Select All Pages' and 'Clear Page Selection' options for this purpose.
- In addition to using the Tasks page, you can submit pages directly from SmartEdit mode. After modifying a page, with the page still open for editing (green dotted line showing), right-click somewhere in the page content and select 'Submit to Workflow'. You can also 'Undo Changes' using the same technique.

## The Web Q (http://wds.semo.edu/help)

The Office of Web Design & Support operates a web-based ticketing system to centralize and address support and troubleshooting requests.

- Visit the Web Q at http://wds.semo.edu/help and log in using your Southeast Key and password.
- After logging in, you will be taken to a Dashboard that displays your previous tickets, and provides an option to create a new ticket.
- Submitting a new ticket will essentially create a new conversation thread, similar to the way a forum works. *Each submitted ticket must* ***include either the page ID or live web address (URL)*** *for the page (or pages) involved in the request.* This helps us quickly identify the content being discussed. Please note that the Open Text session URL provides no information; we need to have the address of the page as it exists on the live website.
- Files can be attached to the ticket by clicking the 'Multiple File Upload' button to the right of the text field when creating a ticket. This is the **preferred method for submitting media gallery content** for the Asset Manager.
- Each time the ticket is updated, a notification email is sent to the author of the ticket. Click on the link within the email to open the ticket in your browser, and submit a response if necessary.
- Tickets are classified by their status.
    - 'New' indicates that no one has yet opened your ticket,
    - 'Open' means the ticket has been viewed but not yet assigned,
    - 'In Progress' means the ticket been assigned and someone in our office is processing the request.
    - 'Awaiting Response' indicates that we have asked a question and are waiting on your reply before continuing.
    - 'Resolved' indicates that the ticket has been addressed. You will be unable to post to a ticket after it has been resolved, so follow-up questions should be submitted in a separate ticket with the previous ticket number referenced in the Subject line.