Ingeniux Content Management
Introductory User Guide

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The following Instructions are for UCCS Ingeniux Contributors

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1. Log Into Ingeniux

- To start the Author Client, type the uniform resource locator (URL or World Wide Web address) for the Ingeniux site in the address bar of an Internet Explorer.
- [http://ajax.uccs.edu/uccsdt](http://ajax.uccs.edu/uccsdt)

*If you are using Ingeniux from home, you will need to VPN into the UCCS network before connecting to Ingeniux.

2. General Ingeniux 10-step Process

Below are the most common steps to create and publish files on to the web using Ingeniux. A description and screenshots of all of these commands to follow:

- Find Site
- Create new Overview Page and drag into place
- Create new Detail Page and drag into place
- Check out File
- Use Editor to develop content or cut and paste from Microsoft Word.
- Add images, pdfs, and other media to assets folder. Create links.
- Save
- Check In
- Mark for Publish
- Publish
3. Using the Ingeniux Dashboard

- Typically, The Dashboard will display all logged in users and recent pages that the user has edited.
- **New**- allows the user to create a page using the selected Page Creation Rule if one or more Page Creation Rules are available.
- **In Progress** – lists the pages currently checked out to the logged in user. Selecting a page in the list will go to the selected page.
- **Favorites**- provides a list of pages the logged user has saved as a favorite. To save a page as a favorite, simply drag the page to the favorite section. To remove it, select the X to the right of a page listing to remove the page from the favorites section.
- **Recently Visited**- lists the pages recently visited. Selecting a page in the list will go to the selected page.
- **Site Status**- lists the users currently logged into the system. Selecting the user in the list will open an email message with the Ingeniux user’s email address pre-populated.
- **Publish Status**- lists, by publishing target, the date and time of the last publish.
- **CMS Statistics**- lists the general CMS site statistics such as the server version, number of pages in the site, and the total number of users for the site.
4. Find Your Site

- Click on Content Store
- Find Site inside appropriate page (IT Webservices will let you know where your site is located)
- Open Page
- Open Site
- Selecting the Site Map tab gives the user a hierarchical view of how content is structured in the Content Repository and provides a way to change the order of items on the site.
5. Create a new Overview Page and drag into place

- **Overview Pages** are top level pages that automatically generate a bulleted page.

6. Create a new Detail Page and drag into place

- **Detail Pages** are menu category pages. Detail pages fall under Overview pages.
7. **Check IN / Out** folders, files or components

- checks in or checks out the page, saving page edits depending upon the status of the current page.
- Check in /out page or page and children. (Checkout out an entire folder or Overview Page and any detail page in the folder or under the Overview Page (Children).

8. **Page Properties**

- Shows Name of page
- Shows Page ID # (This idea number comes in handy for internal links).

Shows creation date, last modified date
9. Context Menus

- The Context Menu provides application functions by right-clicking (Ctrl+clicking in Mac environment) particular node in the site tree.

- **New** initiates the new node option allowing the user to create a new folder, page, or component depending on the user’s permissions an access to the selected location in the site tree.

- **Rename** launches the Rename dialog to rename the selected node.

- **Refresh** updates the Navigation and Edit panes to reflect any changes to content.

- **Cut** prepares a node to be moved to a new location in the site via the paste option.

- **Copy** prepares a copy of the selected node to be created in the site tree via the paste option.

- **Paste** completes a node move, e.g. a cut or copy, moving the node or creating a copy of the node beneath the selected node. Note that the logged-in user must have full access to the destination node and permissions to create new nodes in order to complete a paste operation.

- **Delete** moves the selected node into the Recycle folder.

- **Assign To** launches the Page Assignment dialog providing the option to change the selected node’s user assignment, provided the user has sufficient permissions.

- **Advance** moves the selected page through the selected workflow transition via the Transition dialog.

- **Show History** displays page progress through workflow. A page not in workflow does not have any history associated with it.

- **Send Mail** launches the send mail dialog. The Send Mail dialog can send mail to one or more CMS User groups and/or one or more individual users.

- **Check Out** unlocks the selected page to allow content editing.

- **Check In** saves the selected page and prepares the page for review.

- **Undo Check Out** reverts the selected page back to the last checked-in version.

- **Rollback** discards recent edits and returns the page to the content as it was last checked-in.

- **Mark for Publish** makes a page available for a publish when the page is checked in.

- **Unmark for Publish** prevents the current version of the page from being published.

- **Preview** applies the associated style sheet to the page and displays it as it will be seen on the production site.

- **Publish** launches the Publish dialog for selecting the publishing target and the type of publish for the page.

- **Page Properties** launches the Page Properties dialog for editing various page properties, setting user group access to the page, and applying Page Creation Rules to the node.
10. **Edit Pane**

**Edit Form**

![Image of Edit Form](image1)

**XML**

```xml
<?xml version="1.0" ?>
<!DOCTYPE UCCSMainSubPage PUBLIC "-//UCCS//DTD UCCS Main Sub Page//EN" "http://ajax.uccs.edu/uccsid/xml/stylesheets/uccs.xsd" ->
-UCCSMainSubPage Name="students" Layout="uccs.xsl" Locale="" XPowerPath="/ContentStore/Pages/Main Pages/students" ID="x1175">
  <string label="Title" readonly="false" hidden="false" required="true" ID="1">
    Current Students
  </string>
</UCCSMainSubPage>
```

**Page View**

![Image of Page View](image2)
History

- **XML tab** – displays the XML generated by the current page. Not available for Folder nodes and is only available to users with sufficient privileges to view the XML.

- **Edit Form tab** – is the main content editing interface. Various elements are listed for the page based on the contents of the page. The page icon will be grayed-out if the page is checked in or assigned to another user. In this state, the content cannot be edited by the current user.

- **Categorize tab** – provides an interface to manage taxonomy values associated with the selected page provided the logged-in user has permissions to manage these taxonomy values. Not available for Folder nodes. (Currently not available in Ingeniux)

- **History tab** – lists prior saved versions, i.e. checked-in versions of the current page. Given sufficient permission, a user can revert the current page to a prior version. Not available for Folder nodes.

- **Page View Tab** - applies the specified style sheet(s) to the XML content and displays the page as it would appear when rendered on the live site. This tab is not available for components or folders as no style sheets are associated with these node types.

- **Mark/Unmark for Publish- Mark** Marks the current page for publishing if it is currently unmarked.

- **Unmark** Unmarks the current page if page is marked. If the current page has children, the user will be given the option to mark/unmark the current page or current the page and its children.
11. Mark For Publish / Unmark for Publish / Publish / Publishing Monitor

- **Publishing Target** sub-directory of the `<site>`\xml\pub directory to which pages are published to, specified during an incremental or full publish.
- **Incremental Publish** publishes selected pages and its dependent pages to publishing target.
- **Full Publish** publishes all checked in pages marked for publish for a given publishing target; deletes the contents of the Publishing Target before publishing all pages.

![Publish Monitor - Google Chrome](ajax.uccs.edu/uccsdt/client/asp/views/publishMonitor/pubStatus.asp)

**Publish Monitor**

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Last Publish Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCCS</td>
<td>Publishing Files</td>
<td>5/11/11 10:17 AM</td>
</tr>
</tbody>
</table>

- Shows Name
- Status (publishing Files, Complete)
- Last Publish Date

**Publish Logs** Show Publish Date and time, total time, avg time, # of pages, page ids
12. Make a Link Component

- Components - Components are items in the content repository that are used on other pages, such as an image component, a link, or navigation component. Components can be associated to a page by dragging and dropping the desired item from the Site Map or Search Results page directly into the data field. Components will have an icon next to them that can be clicked in order to edit the attributes of the component.

13. Rename a Page

Ex 1.
Ex 2.

- **Ex 1. Rename** – Right click on file to launch the Rename dialog.
- **Ex 2.** From Edit Form View Change the page name at the top. Notice you also change the document title from the title field. The page name and title can be different names.

### 14. Preview a Page

- **Preview** applies specified style sheet to the current selected page to provide a view of what the page will look like on the web server.
- **Preview page** on various user agents, MSIE, Mozilla, and Opera.
15. Manage Assets

Manage Assets Adding an image or other asset to a page is a two-part process: First, the asset must be uploaded from the user’s local machine to the server that runs Ingeniux CMS. Once it is there, it can be used repeatedly on other pages.

Add Images to Appropriate Assets Folder
**Documents** PDF files, word documents and excel spreadsheets
**Images** jpg, gif and png
**Media** mov, wmv, mp4 etc.

**Prebuilt** css, js etc.

**Path examples:**
Documents/alumni/test.pdf
Images/shc/graphic1.jpg
Media/staffcouncil/staffgames.wmv
PreBuilt/onlineorientation/style1.css

*Note the folder name starts with a capital letter*

**16. Ingeniux Image Editor**

- From Manage Assets, click on image you want to change. Click **Edit Image**.
- **Resize** Make Images Smaller for the web. Click “Keep Aspect Ratio” to preserve image height and width.
- **Crop** Click Crop, Move corner handles to crop click on green checkmark to implement crop.
- **Rotate** Click arrows on image to rotate, save as new file name.
- **Flip** Click arrows on image to flip “Inverse”.
### 17. Ingeniux Content Formatting Editor

<table>
<thead>
<tr>
<th>Button</th>
<th>Action Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
<td>opens the HTML Source Editor dialog</td>
</tr>
<tr>
<td>CUT</td>
<td>cuts selected text</td>
</tr>
<tr>
<td>COPY</td>
<td>copies selected text</td>
</tr>
<tr>
<td>PASTE</td>
<td>pastes content including all formatting into (X)HTML Editor</td>
</tr>
<tr>
<td>PASTE FROM WORD</td>
<td>pastes text from Word document without word specific formatting</td>
</tr>
<tr>
<td>PASTE TEXT</td>
<td>pastes text from previous Cut or Copy action without any formatting from the original version</td>
</tr>
<tr>
<td>UNDO</td>
<td>undoes previous action</td>
</tr>
<tr>
<td>REDO</td>
<td>re-applies previous action</td>
</tr>
<tr>
<td>TEXT COLOR</td>
<td>Select text color</td>
</tr>
<tr>
<td>BACKGROUND COLOR</td>
<td>Select background color</td>
</tr>
<tr>
<td>LEFT JUSTIFY / CENTER JUSTIFY</td>
<td>justifies selected text to the left margin / justifies selected text to the center</td>
</tr>
<tr>
<td>RIGHT JUSTIFY / FULL JUSTIFY</td>
<td>justifies selected text to the right margin / justifies selected text to the left and right margins</td>
</tr>
<tr>
<td>ORDERED LIST / UNORDERED LIST</td>
<td>Create Ordered and Unordered Lists</td>
</tr>
<tr>
<td>INDENT / OUTDENT</td>
<td>indents selected text / outdents selected text</td>
</tr>
<tr>
<td>CREATE A LINK FROM SELECTION</td>
<td>creates a link</td>
</tr>
<tr>
<td>UNLINK</td>
<td>removes the link from the selected text</td>
</tr>
<tr>
<td>INSERT ANCHOR</td>
<td>inserts anchor tag to be modified in the HTML tab</td>
</tr>
<tr>
<td>INSERT IMAGE</td>
<td>opens the Insert/Edit Image dialog</td>
</tr>
<tr>
<td>INSERT RULE</td>
<td>inserts horizontal line</td>
</tr>
<tr>
<td>INSERT CUSTOM CHARACTER</td>
<td>opens the Select Custom Character dialog</td>
</tr>
<tr>
<td>INSERT / EDIT EMBEDDED MEDIA</td>
<td>opens the Insert/Edit Embedded Media dialog</td>
</tr>
<tr>
<td>INSERT NEW TABLE</td>
<td>opens the Insert/Modify Table dialog</td>
</tr>
<tr>
<td>TABLE ROW PROPERTIES</td>
<td>opens the Table Row Properties dialog</td>
</tr>
<tr>
<td>TABLE CELL PROPERTIES</td>
<td>opens the Table Cell Properties dialog</td>
</tr>
<tr>
<td>INSERT ROW BEFORE</td>
<td>inserts a row above the selected row</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>INSERT ROW AFTER</td>
<td>inserts a row below the selected row</td>
</tr>
<tr>
<td>DELETE ROW</td>
<td>deletes the selected row</td>
</tr>
<tr>
<td>INSERT COLUMN BEFORE</td>
<td>inserts a column to the left of the selected column</td>
</tr>
<tr>
<td>INSERT COLUMN AFTER</td>
<td>inserts a column to the right of the selected column</td>
</tr>
<tr>
<td>REMOVE COLUMN</td>
<td>deletes the selected column</td>
</tr>
<tr>
<td>SPLIT MERGED TABLE CELLS</td>
<td>splits the selected table cell</td>
</tr>
<tr>
<td>MERGE TABLE CELLS</td>
<td>merges a previously split cell</td>
</tr>
<tr>
<td>FIND</td>
<td>opens the Find/Replace dialog</td>
</tr>
<tr>
<td>FIND / REPLACE</td>
<td>opens the Find/Replace dialog</td>
</tr>
<tr>
<td>BOLD / ITALIC / UNDERLINE</td>
<td>bolds selected text / italicizes selected text / underlines selected text</td>
</tr>
<tr>
<td>STRIKETROUGH</td>
<td>strikes through selected text</td>
</tr>
<tr>
<td>SUPERSCRIPT / SUBSCRIPT</td>
<td>formats selected text as superscript. / formats selected text as subscript</td>
</tr>
<tr>
<td>STYLES</td>
<td>selects CSS Class to apply to text in editor</td>
</tr>
<tr>
<td>HEADING TAGS</td>
<td>selects format (heading 1, etc) to apply to selected text</td>
</tr>
<tr>
<td>FONTS</td>
<td>selects font to apply to selected text</td>
</tr>
<tr>
<td>FONT SIZE</td>
<td>selects Font size to apply to selected text</td>
</tr>
</tbody>
</table>

18. Cut and Paste from html into Web Editor such as Dream Weaver or others

- **HTML** opens the HTML Source Editor dialog
- Ctrl + A to select code
- Switch to Dreamweaver or HTML Editor
- Open code view
- Ctrl + V to paste
- Modify document
- Switch back to Ingeniux HTML Source Editor and ctrl V to paste into that window
19. Create Links

Internal

- Link to “id #” for internal link or filename.html
External

- Link to External Links

Document

- Link to documents that reside in Documents folder
Anchor

- Link to name Anchors

E-Mail

- Link to email links mailto:username@uccs.edu
Keyboard Shortcuts

- CTRL + ALT + N, New Folder
- CTRL + SHIFT + N, New Component
- CTRL + S, Save
- CTRL + SHIFT + P, Preview Page
- CTRL + SHIFT + R, Rename Page
- CTRL + M, Upload
- ALT + ENTER, Properties
- CTRL + X, Cut
- CTRL + C, Copy
- CTRL + V, Paste
- F2, Help
- CTRL + SHIFT + I, Check In a Page
- CTRL + SHIFT + O, Check out a Page
- CTRL + D, Show Differences
- CTRL + N, New Page
- CTRL + T, Advance through Workflow
- CTRL + K, Assign to
- CTRL + F7, Spell Check
- CTRL + F5, Refresh Tree
- DEL, Delete
Notes about Ingeniux to be continued...

- Remember to mark to publish before document can go live.
- Any publish from Ingeniux will also publish any assets that you have in the assets folders.
- Drag and Drop Detail and Overview Pages for easy construction of navigation. Remember to refresh / reload page to view navigation from Ingeniux preview modes.
- Rename title with Title tag inside Edit Form View.
- Consider adding an external style sheet to your website for more styling that the defaults.
- Easiest and most efficient way of adding assets is by adding multiple assets at a time to your folders. Click on the first file to anchor it and then control click on every subsequent file.
- If you wish to publish a link component, publish the page that contains the link component.
- Consolidate tasks by checking in / out page and children, mark for publish page and children, and publish page and children.
- Publishing has a delay between “completed” and being live. A third-party process moves the published web content from the Ingeniux design-time server to the live webserver.
- An example of the correct path to documents, images, media and prebuilt is: Images/sitename/subfolder (*note that the I in images is capitalized.)
- An example of the correct path to items in the prebuilt folder is: PreBuilt/sitename/subfolder (*note that in this example the P and the B in prebuilt are capitalized.)
- Link to test (development server) http://www.uccs.edu/cms-igx/sitename
Ingeniux Training Outline

1. Review of sample site to show menu and top banner (coe, online orientation)
2. Dashboard
3. Find / Open Site / Content Store
4. Site Tree
5. Create Detail Pages / Overview Pages
6. Delete Detail Pages / Overview Pages
7. Page View
8. Check In / Check out
9. Checkout to work on pages in Ingeniux Editor
10. Tools of the editor, Paste from word, Insert / Edit Image / H1..H6 etc.
11. Cut and paste html from Ingeniux to html editor such as Dreamweaver
12. Assets (create new folders, upload)
13. 4 folders, Documents (pdf files, word files, excel files etc.), Images, Media (mov, flv, swf, wmv, etc.) Prebuilt (css, js)
14. Context Editing (Editing while showing what the page will look like in real time)
15. Links: (Internal “xml ids”), External, Document, Anchor, Email
16. History (revert to selected version)
17. Edit Form (html head, enable title hidden, SEO fields)
19. Mark for Publish
20. Publish
21. Staging hyper link (http://www.uccs.edu/cms-igx/sitename)