OmniUpdate User Training

Review for Updates on: February 1, 2018

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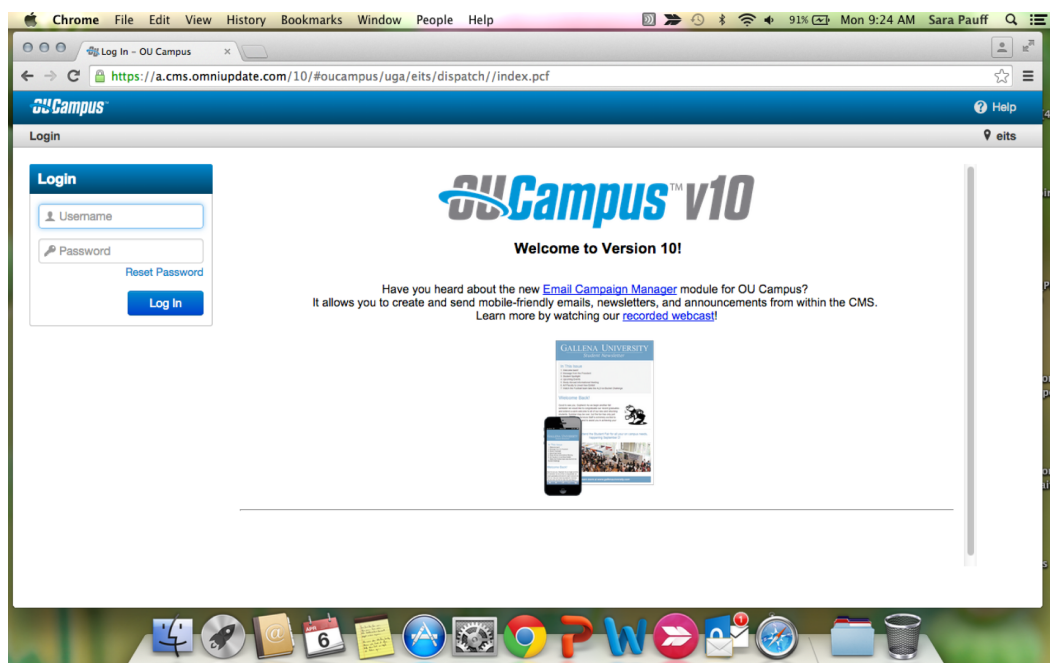
When you click on the hidden link or visit the login URL, you will be taken to the OmniUpdate log-in page.
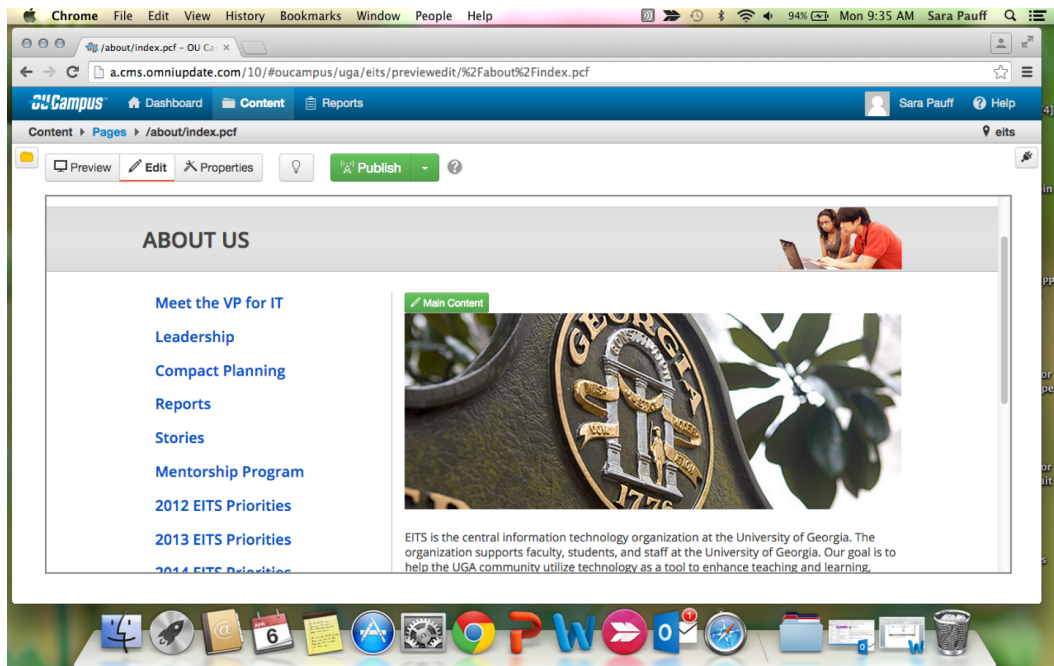
OmniUpdate Workflow Process

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 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**.
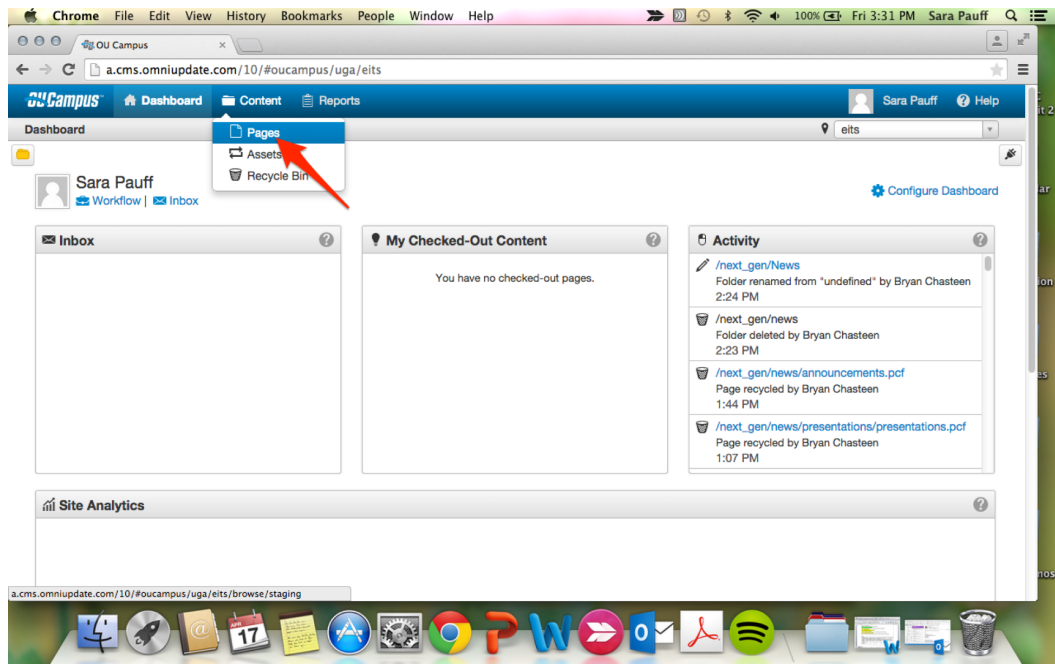

Pages and content in OmniUpdate operate under a folder system. Each section of your website is a folder. To edit a page, you'll need to find the section/folder that your page is in, and open it.

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.
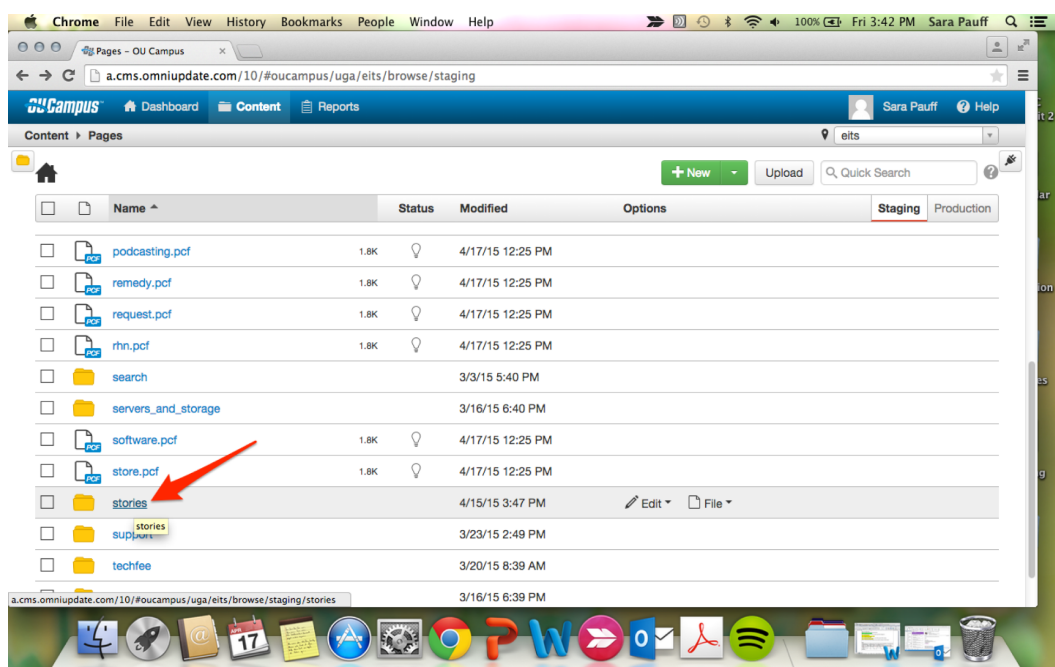
Editing Content on an Existing Page

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**.
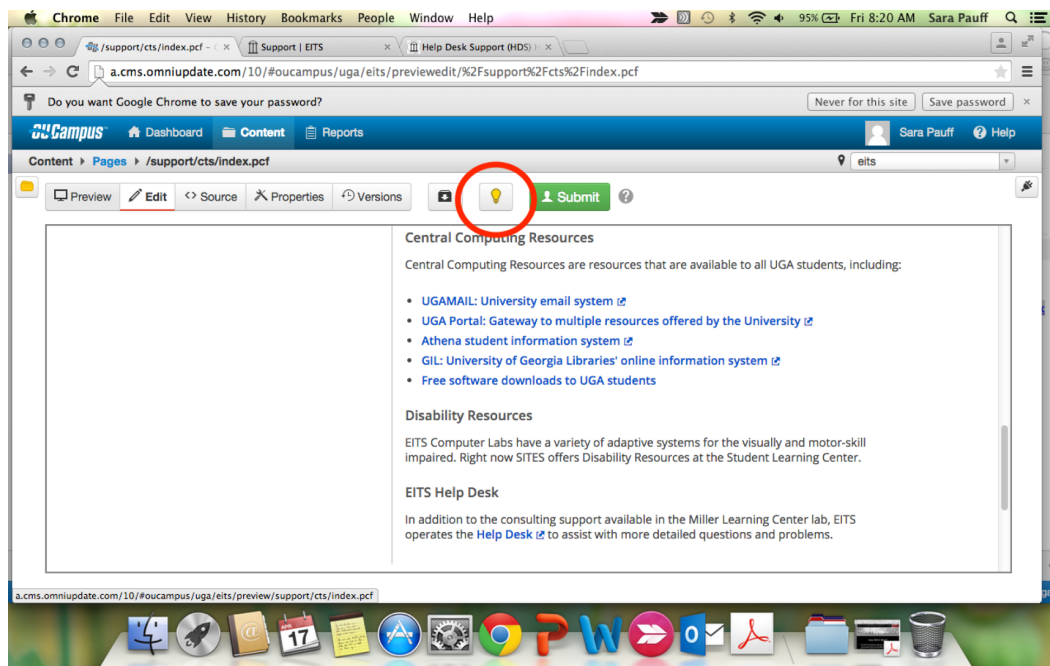

You will also see a **yellow light bulb icon**. That means the page is checked out to you. You can only make changes to the page when it is checked out to you. If there is a lock icon instead of a light bulb, the page is checked out to someone else and you cannot edit it until the page is checked back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

To make changes, click on **Edit**.

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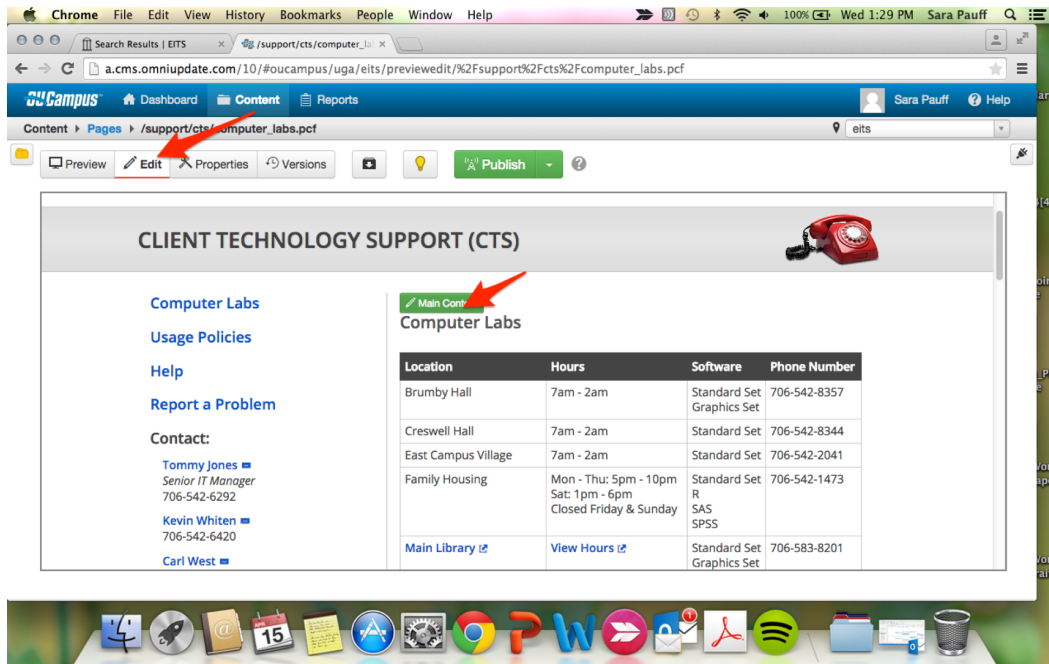
The **editing toolbar** is similar to one you might find in Microsoft Word, with a few extras. You should have options for cut, copy and paste; making text bold and changing the alignment of text; changing the paragraph styles; inserting links; inserting tables; and inserting pictures and video.

You also see an option for changing the form of the text, creating headings, paragraphs and block quotes.
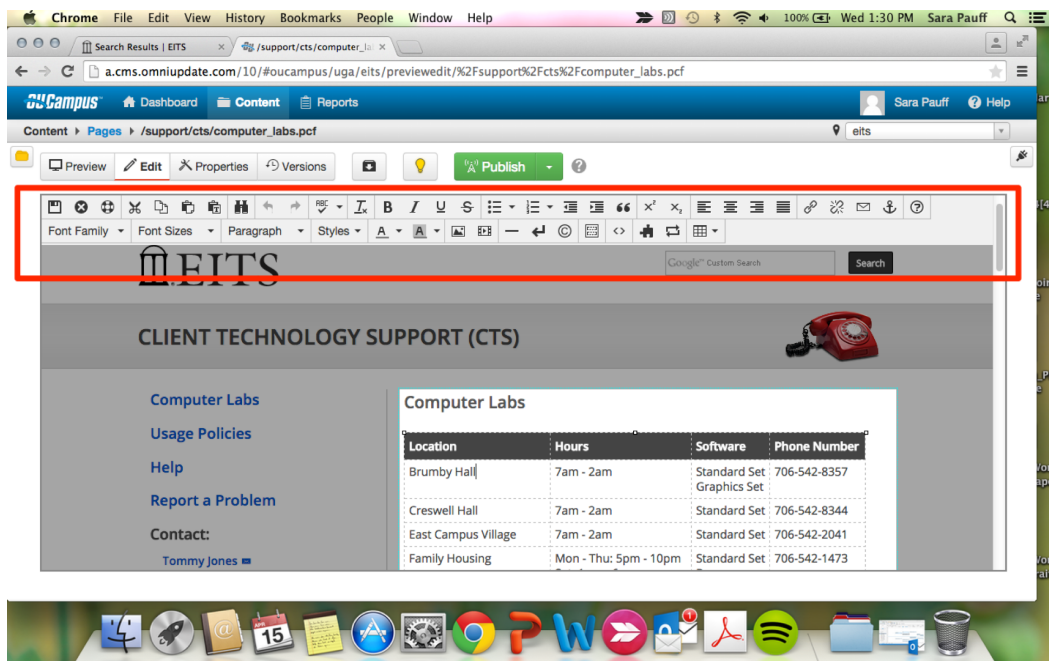
Inserting and Editing a Text Link

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.
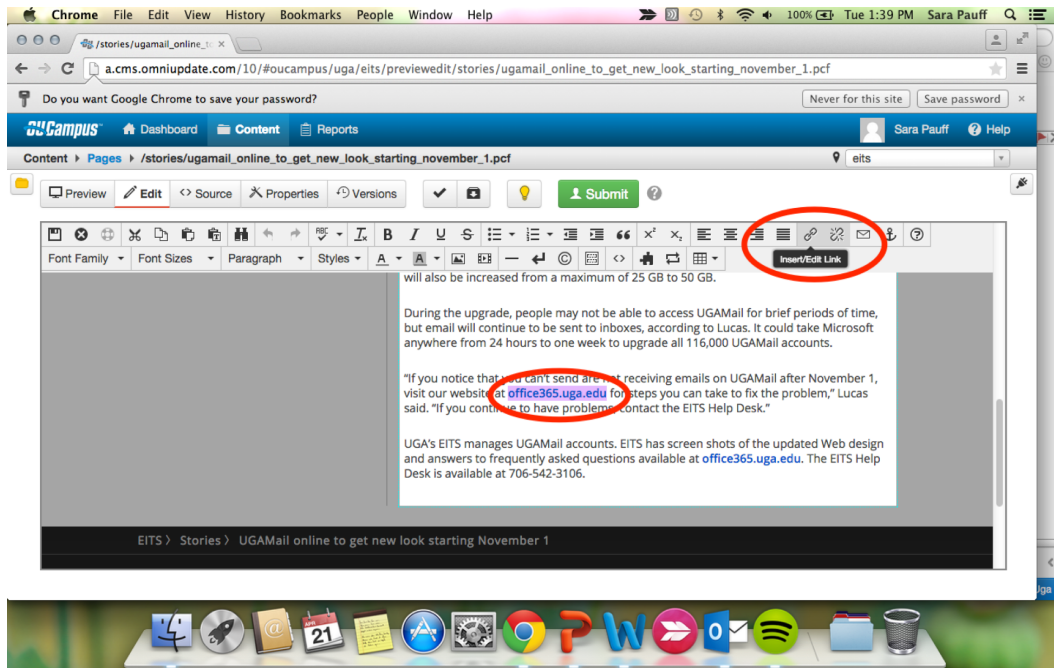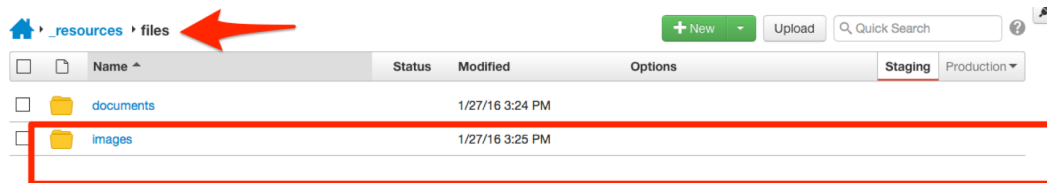

This will bring up a window for you to type in the link. You can also select the text to display and whether you want the link to open in a new window.
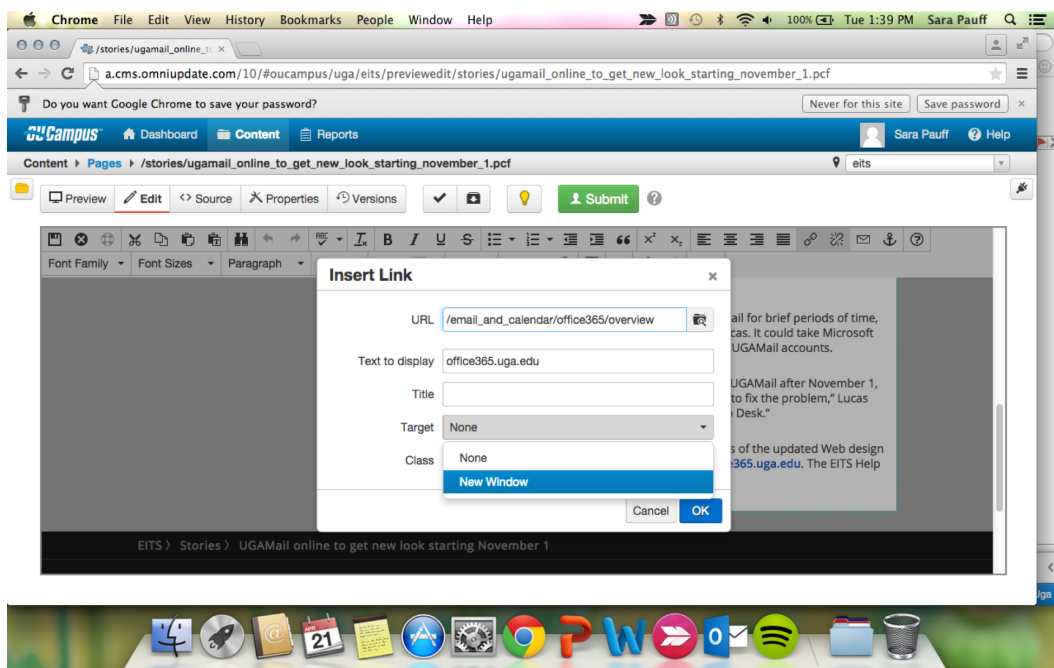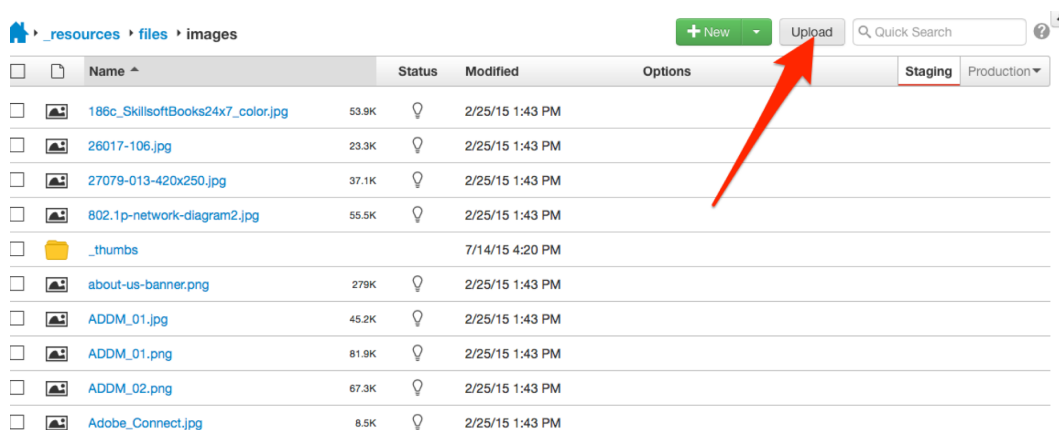
Inserting an Image

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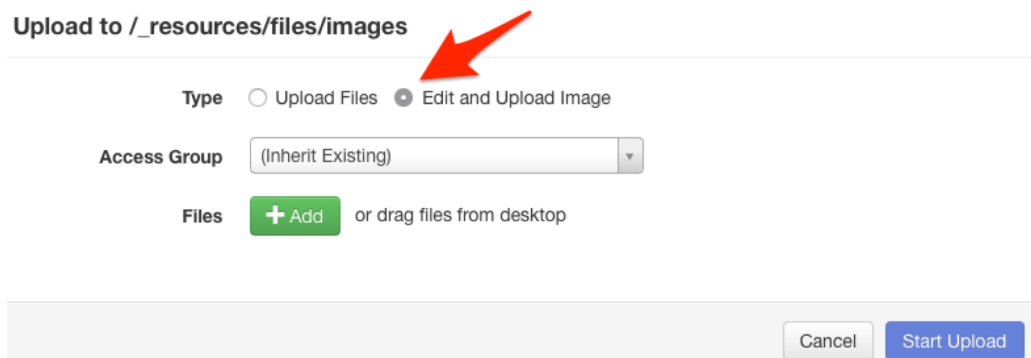
Once the image has been uploaded, this screen will appear, which will **allow you to Resize, Crop, Rotate and Zoom In on your Image** if you wish. Once you have finished making changes to the image, be sure to click the blue **Save** button at the bottom of the screen, or your changes will be lost.
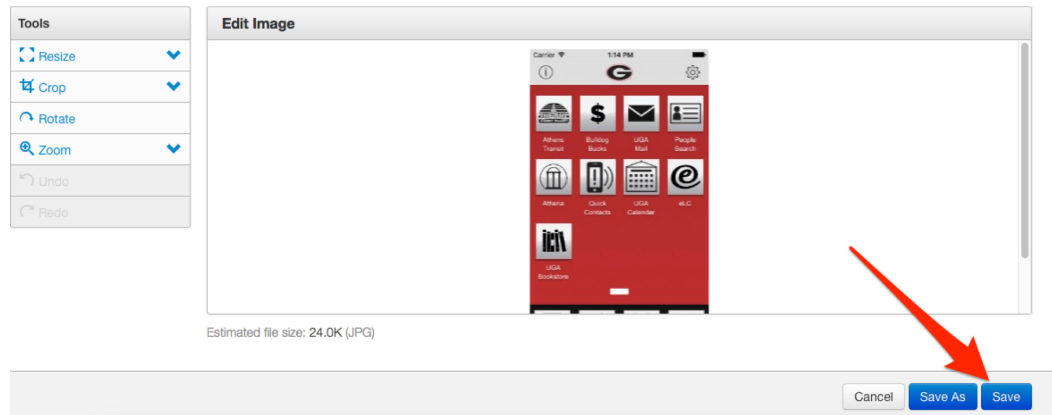

A new screen will pop up, showing you your image. From there, you can go back to the page you were editing (using the OmniUpdate file structure) and place the image on the page.

To place the image on the place, 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.
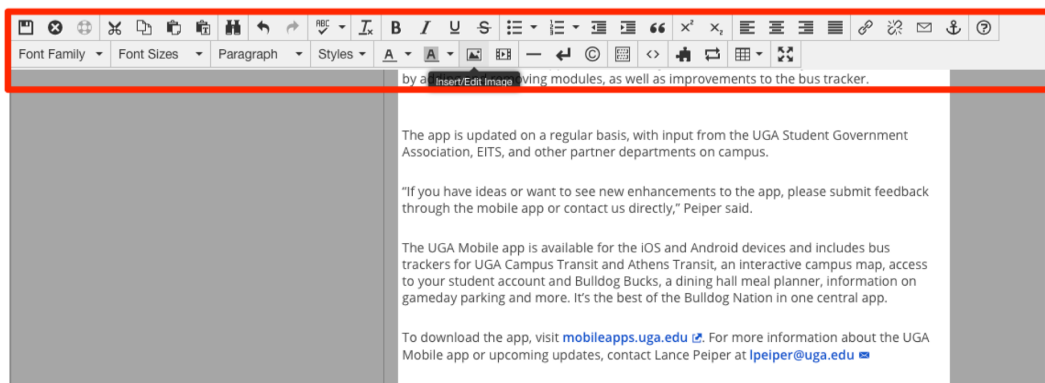
This will open up a window for you to search for the image in the OmniUpdate file structure. The most recently-edited image should appear at the top.
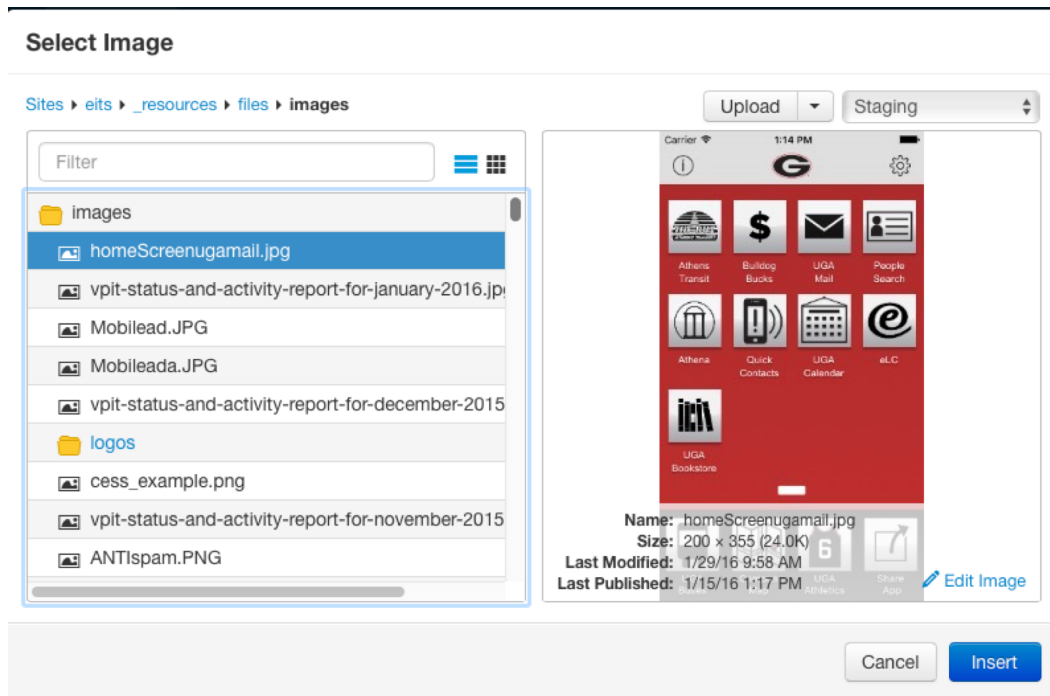
Click **Insert** to add the selected image to a page. You can also **choose the alignment for an image**. Make sure you **put in descriptive text** as well, so that the page meets web accessibility guidelines.
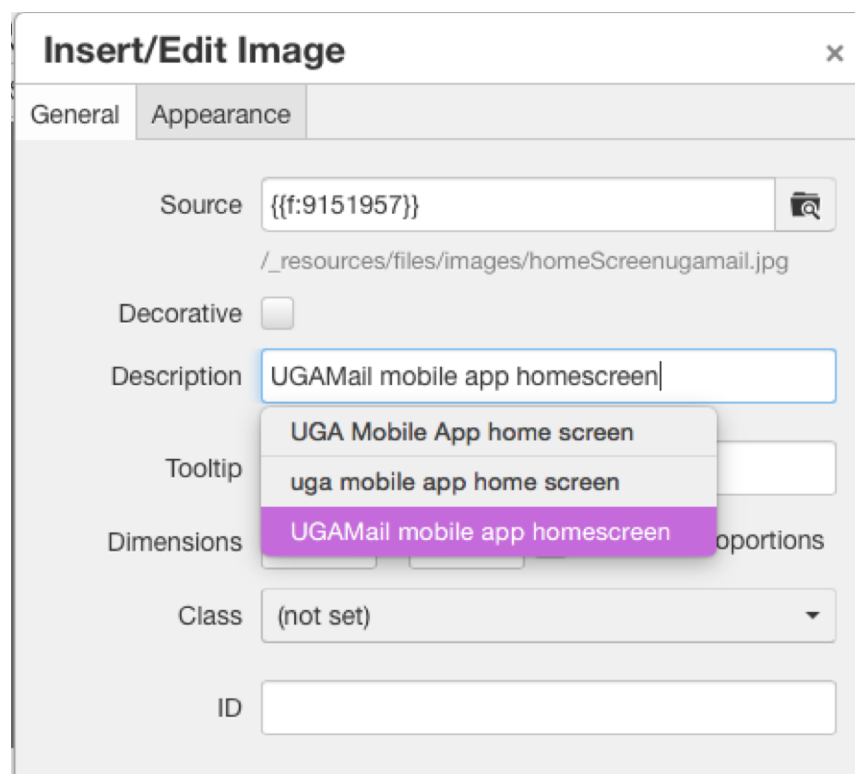
Once you click the blue **OK** button, the image will be inserted on the page. From there, you can move the image around and resize it.

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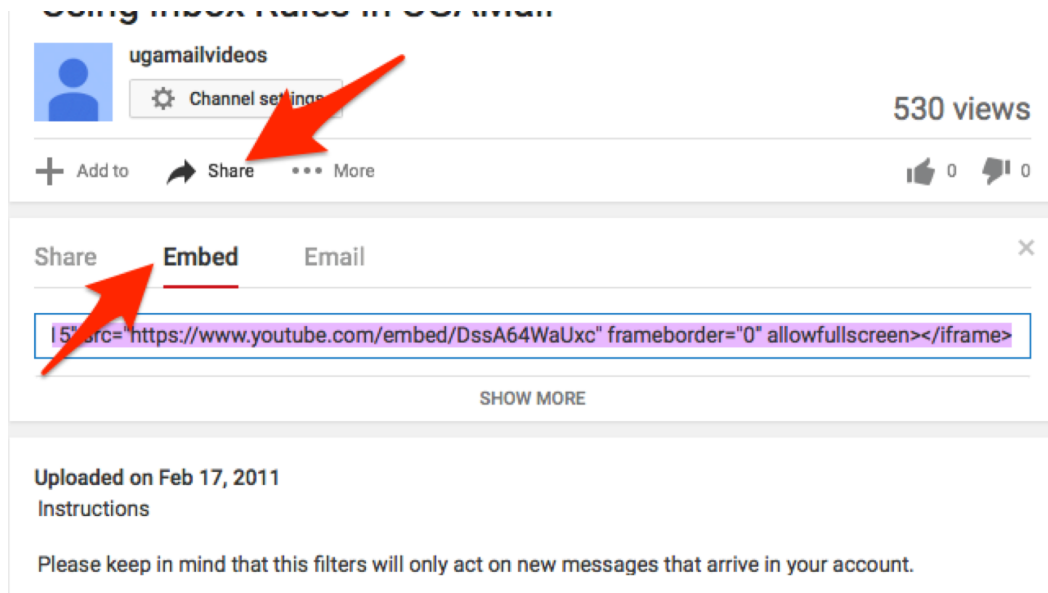
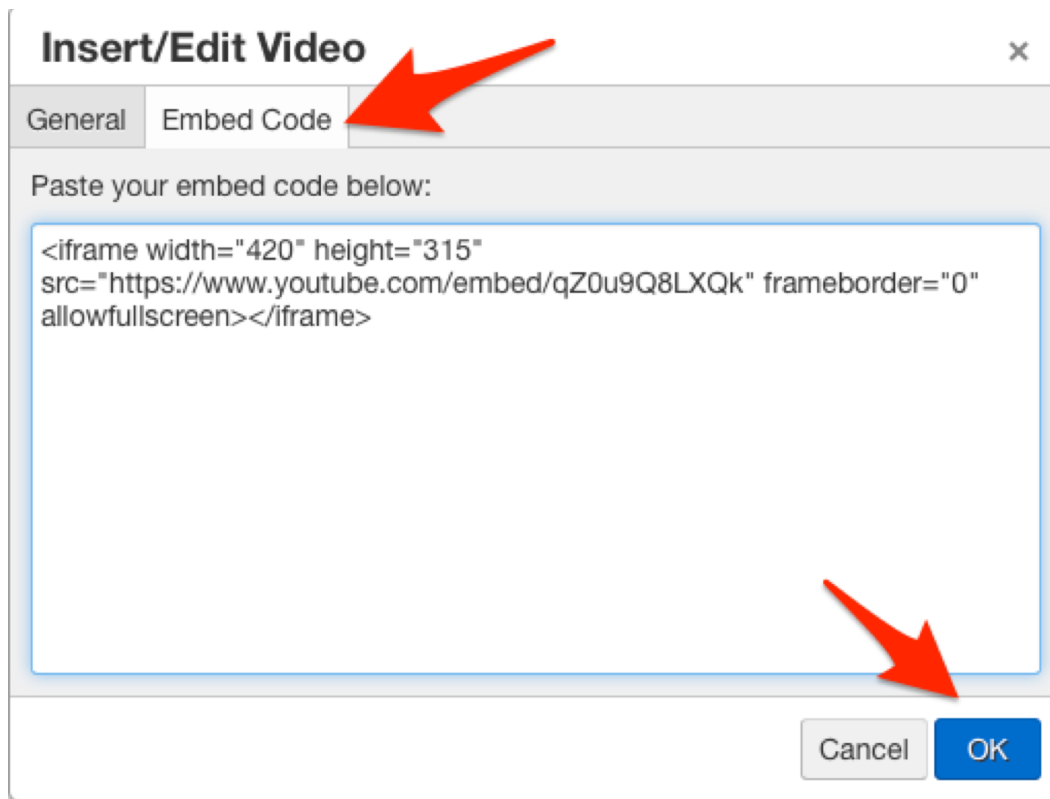**Copy the embed code**, then go to the page you wish to edit in OmniUpdate.

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 **OK**.

**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.
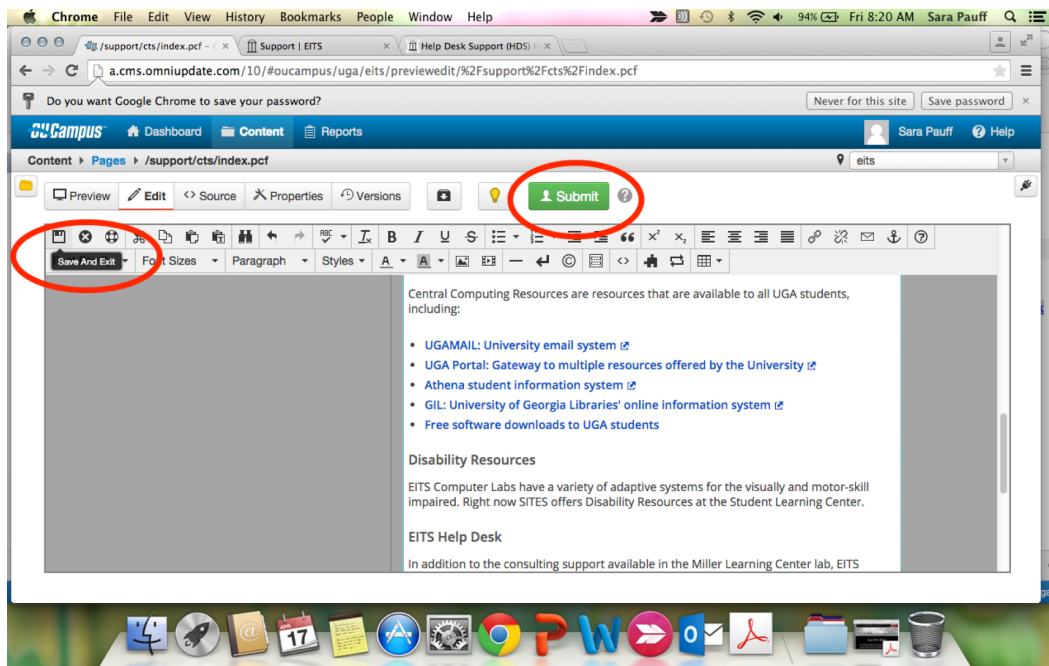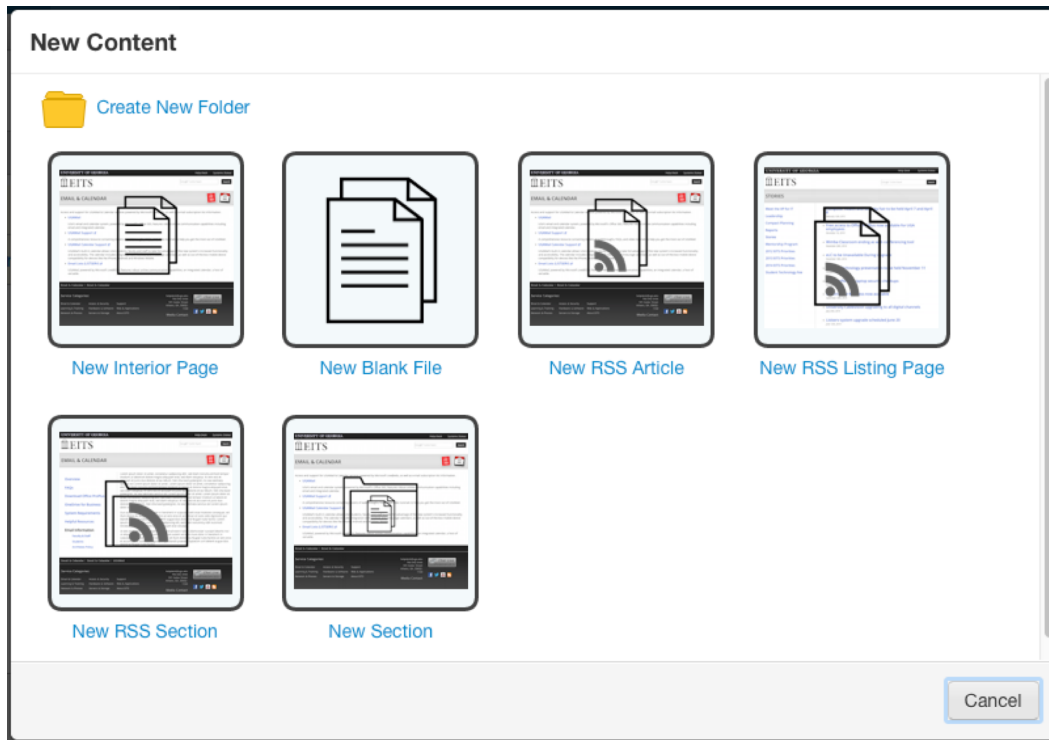
Creating a New Page

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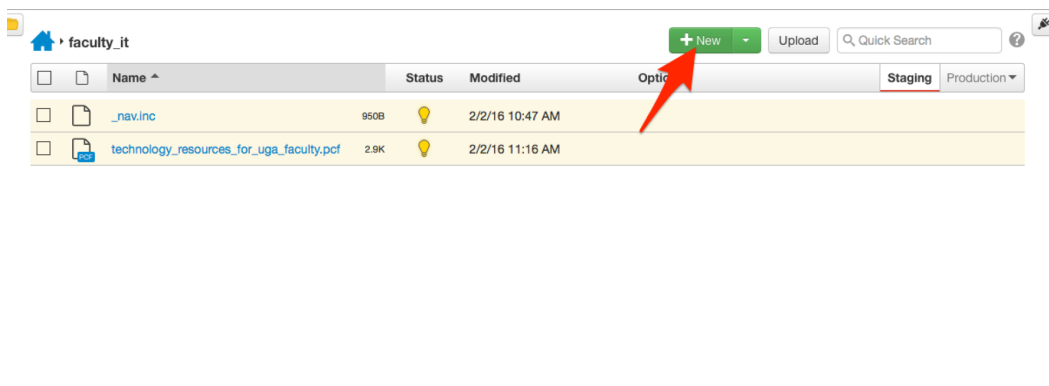
This will open a new window with options for the page. Most of the time you will select the option to create a **New Interior Page**.

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.**

Leave the **Access Group** to "Inherit from Parent", unless you wish for other groups beside your own to have access to editing rights. Click **Create**.

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.
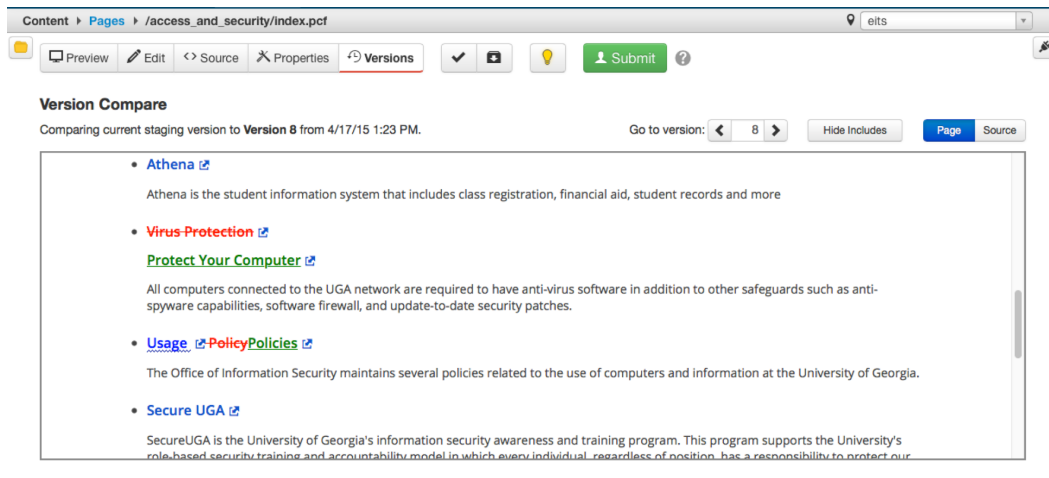
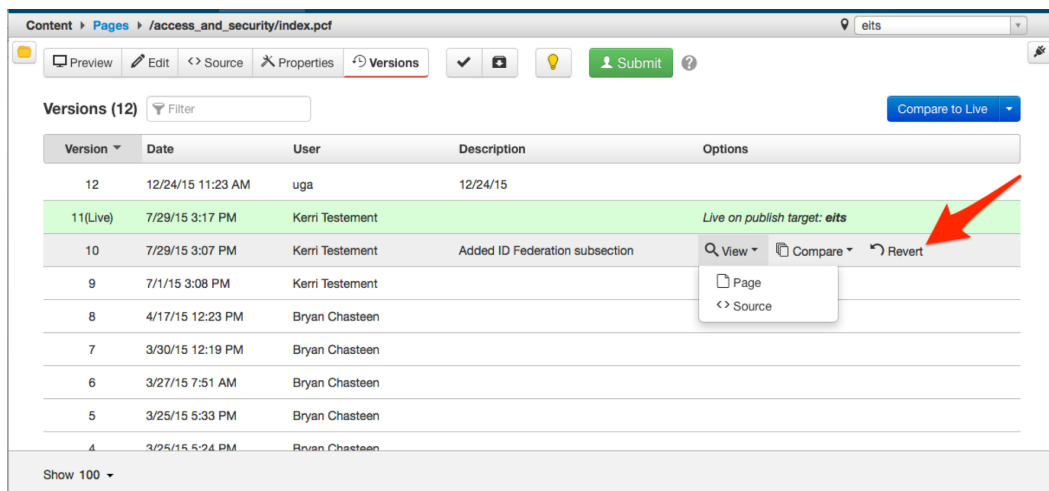This will give you access to view all the past published versions of a page.
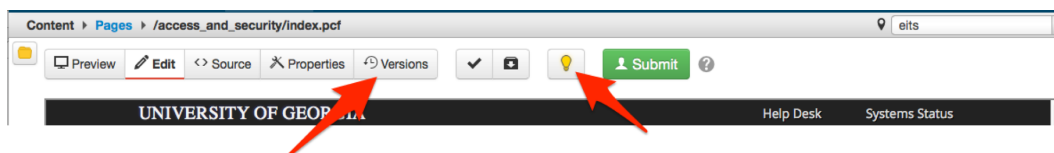
From here, you can view the older page or compare it to the current page.
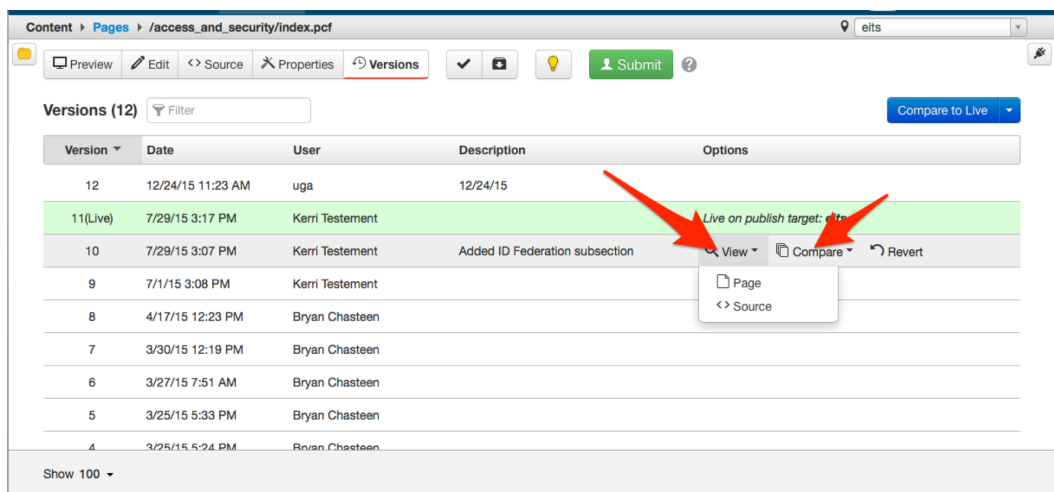
When you compare versions, any changes made to the page will appear in red, for deletions, and green for additions.

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


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.
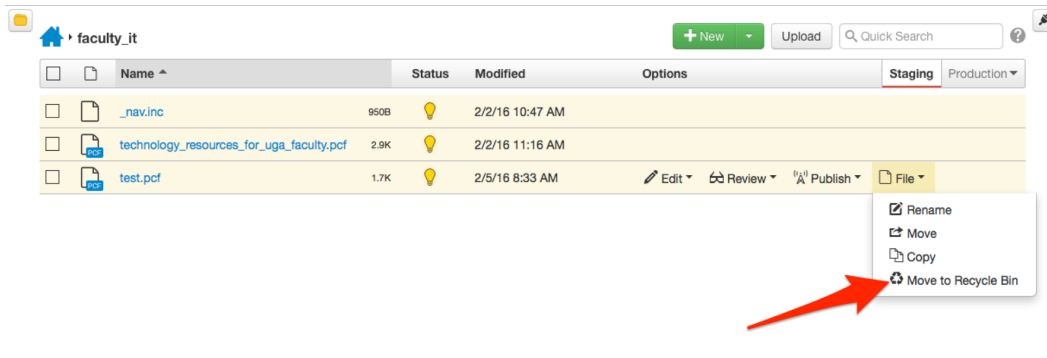
Click **Move to Recycle Bin**. A new window will pop up asking you to confirm that you want to move the page to the Recycle Bin. Click the red **Move to Recycle Bin** button to confirm.
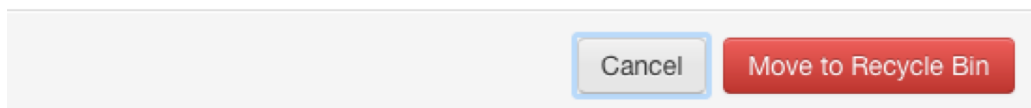
If you wish to retrieve a page from the Recycle Bin, contact your site administrator.