Getting Started with the Ingeniux CMS Client

1.0 Starting the Windows Client

To start the Client, double-click your Web browser icon (Firefox, Safari, or Internet Explorer) and enter the site url
http://wsc.ingeniuxondemand.com

When prompted to log-in, enter the following:

Username: first.last

Password: (unique password given to you)

2.0 Overview of User Interface

The Author Client user interface (UI) consists of two main elements: The left-hand document tree and the right hand Overview Tab. These will be discussed below.

2.1 Dashboard

When you select the Dashboard Icon, the Overview Tab appears on the right and shows several different ways for the user to access content. "New" allows the user to create new pages in the CMS, "In Progress" refers to pages that are currently assigned to you, "Favorites" is a drag-and-drop list of pages the user likes to watch in the CMS, and "Recently Visited" is the most recent pages the user has visited in the demo site.

2.2 Site Content or 'Document Tree'

Selecting the Site Content tab on the left gives the user a hierarchical view of how content is structured in the content store and provides a way to change the order of items on the site.

2.2 Assignments List

The Assignments pane shows a list of all pages assigned to you or in your possession. When a new page is created by a user, that page appears in that user's Assignments list until the page is assigned to someone else or transitioned to the next workstate. Other workers may assign pages they have created or someone else in your group may send you a page.

2.3 Search

Selecting this tab launches Search, which is used for finding stories, images, and other items in the content store. Search results display within this pane. *The Search functionality will probably not be set up on training sites. More information can be found in the documentation*.

2.4 Edit Tab

This area of the screen, called the *Edit Form*, provides the main editing area for creating new pages, reviewing existing pages, or editing existing pages. The top of this form displays the page properties which include information such as page name, page ID, who it is assigned to, and which workstate the page is in (if it is in workflow).

2.5 Preview Tab

Clicking the Preview tab provides a rendering of the current page, as it will look when published. This preview is completely functional, with all navigation, links, etc., appearing and functioning as they will on the published site. This also provides a useful alternative to the Assignment list, Search, and the Site Map as a means of finding content.

2.9 Toolbar

This area of the screen contains the command buttons that users can use in the process of creating pages and publishing them to the Web. These are described below.

Toolbar

 The toolbar provides the

following buttons to initiate various CMS actions. Toolbar buttons become active or inactive depending upon the current context. This toolbar resides along the top margin and appears as follows:

Icon	Description
Dashboard	*loads the Dashboard Tab.*
New	*initiates the new node option (see below) allowing the user to create a new folder, a new page, or new component depending on the user's permissions and access to the selected location in the site tree.*
Save	*commits changes to the current page made in the Edit Pane.*
Check Out	*moves the selected page or component into a state where the page can be edited. Availability of this button is based on the status of the selected page.*
Check In	*saves a version of the selected page and prepares the page for review and its eventual publish. Availability of this button is based on the status of the selected page.*
Rename	*launches the Rename dialog to rename the selected node.*
Manage Assets	*launches the Manages Assets dialog for uploading, managing, and referencing Images, Documents, Media files, and other static files.*
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	*launches the Workflow Advance dialog for moving a page or component to the next step of a workflow. This button is only enabled if the selected page or component is currently within a workflow.*
Refresh	*reloads the client Navigation and Edit Panes.*
Help	*launches the client Help window.*
Go to Page Drop Down	*provides an input field for locating pages in the site by entering a page xID, a page name, or using the dropdown to select from a list of prior entered pages.*
Go To	*loads the edit pane for entered page and selects the page node in the Site Tree if the Site Tab is currently loaded in the Navigation Pane.*
Back	*provides the option to load a prior page based on past selected pages.*
Forward	*provides the option to load a page loaded after the current page based on past selected pages.*