



New Administrator Checklist

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Your OU Campus project is delivered and UAT finished, you've completed your training sessions, and now it's time to roll up your sleeves and dig into your new implementation. You should have a good foundation of what tools are at your disposal to get your site set up, and how you can leverage those tools.

As you start working in OU Campus and getting familiar with the platform, **one of your first tasks will be getting the site set up and ready for your content editors to come in and start making changes**. This guide gives you a recommended order to use the administrative tools available inside OU Campus as you set up your account. Not every item is required, depending on your site setup and how you plan to manage it.

✓ **Map and create your new site structure in OU Campus.**

- If content from your old site wasn't migrated over, you need to create the pages and folders of your site. The structure of your site will inform how you create user groups and access settings.

In Progress

Timeline: NOW – BEFORE LAUNCH

Responsible Team: Frontend webadmin

Advisory Team: gc-webteam, cc-webteam
(if needed – TBD frontend webadmin)

✓ **Create RSS feeds.**

- If needed, create starter feeds in **Content > RSS**.

Responsible Team: Backend web admin, Director (GC & CC)
College Relations, Communications and Public Info Director

Implementation: TBD by decision makers in this group

✓ **Create tags and collections.**

- From **Setup > Tags**, start creating tags you want your users to be able to use to label content. You can also disable tags to prevent them from being used, and group tags into collections.

Responsible Team: Director, College Relations

Implementation: TBD by decision makers in this group

✓ **Set up Single Sign-On (SSO) if necessary.**

If you are planning on using LDAP/Active Directory, CAS, or Shibboleth to authenticate, set this up in advance of creating users so they can log in upon account creation.

Responsible Team: Director of IT, backend webadmin

Timeline: **NOW**

✓ **Review user needs***

- Decide what you want your users to do or to be prevented from doing, including uploading files, moving and renaming files, needing approval for publishing pages, and what tools should be at their disposal when editing page content.

Responsible Team: Frontend webadmin

✓ **Create custom toolbars***

- Custom toolbars that limit the options available to users can be made in **Setup > Toolbars**. Once made, these toolbars can be assigned both to users and to sections and pages.

* User needs determined by:

Information collected in the CMS training from: <https://tinyurl.com/ue4ihtd>

AND

User level determined by:

OUCampus: User Interactive Flowchart Tool

Customized toolbars TBD – frontend webadmin

Auxiliary Support: backend webadmin, district IT

(if needed – TBD frontend webadmin)

✓ **Set up template groups and access.**

- From **Setup > Templates**, review the access settings for each template and choose which groups have access to templates. Groups without access won't be able to use that template to make new pages.
- You can also make template groups to be assigned to folders, restricting which templates are available for use in that folder in the first place.

Responsible Team: Backend webadmin
Collaborating Team: Frontend webadmin

Timeline: Ongoing – as content experts sign up for CMS training

✓ **Create user accounts.**

- Refer to the attached "User Level Flow Chart" as a guide for which level to assign users.

Responsible Team: Backend webadmin – for creating accounts
Responsible Team: Frontend webadmin – assigning user levels
Advisory Team: TBD by frontend webadmin

Timeline: Ongoing – as content experts sign up for CMS training

✓ **Build user groups.**

- Add the newly created users into groups. Access settings are assigned on a per- group basis, not per-user.

Responsible Team: Backend webadmin – for creating accounts
Advisory Team: TBD by frontend webadmin

Timeline: Ongoing – as content experts sign up for CMS training

✓ **Assign groups to access settings and configure other options.**

- Each folder and file has access settings determining which group can access and edit its content. **The easiest approach to assigning access is to start with the site itself, allowing access to the largest user group, and then working your way down each branch of the file structure to allow access to gradually more specific groups.**
- Apply template groups, allow or disallow file extensions if needed, apply RSS feeds, and fixed and/or filtered tags, and adjust any directory variables.

Responsible Team: Frontend webadmin
Auxiliary Support: Backend webadmin, District IT

Commented [DT1]: This item might be best implemented working in a group

✓ **Assign approvers.**

- Approvers can be assigned both to users and to folders and files, requiring users to submit content for approval to the assigned approvers, rather than publish independently. Approvers need access to the content they will be approving, so they will need to be in the assigned access group as well (or the bypass approval group). Approvers assigned to folders or files override approvers assigned to users.

Responsible Team: Frontend webadmin

Auxiliary Support: Backend webadmin
(as needed TBD by Frontend webadmin)

✓ **Apply asset access settings.**

- From **Setup > Sites**, you can restrict which group of users has access to **Content > Assets**, and therefore access to creating and editing assets.

Responsible Team: Backend webadmin
Collaborative Team: Frontend webadmin

✓ **Adjust key site and account settings.**

- From **Setup > Account**:
 - Review which page checks you want to enable for your users. We recommend all four being available.
 - Create add-ons for any resources your users should have easy access to, such as training materials or a style guide.
- From **Setup > Site Settings**:
 - Determine if you want final check to run automatically and be enforced so that pages must pass it to be published.
 - **Establish default naming conventions for file naming and binary file naming.**
 - Review and if needed adjust the upload limits.
 - **Create any secondary publish targets if you want users to be able to publish to another location beyond your website.**

✓ **Determine default behaviors for gadgets.**

- From **Setup > Gadgets**, you can determine which gadgets are available to

groups, and which are on or off by default.

- ✓ **Review access settings for snippets.**
 - Each snippet can be restricted so that only a certain group can place it on the page. Go to **Content > Snippets** and review each snippet. It doesn't hurt to make sure the snippets are named clearly and are in appropriate categories.
- ✓ **Connect to third-party accounts.**
 - From the **Setup** menu, you can associate your OU Campus account with Google, Facebook, Twitter, and YouTube, for use with analytics gadgets, posting to Facebook and Twitter when publishing a page, and use with the YouTube gadget.