



How to Tag Content in OU Campus with Tag Management

OmniUpdate User Training Conference 2016 Activity Guide

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How to Tag Content in OU Campus with Tag Management

Tags in the Setup Menu

Administrators can manage tags for the entire account through the **Tags** section of the **Setup Menu**. This includes adding, deleting, disabling and merging tags, and creating and editing collections. As this is in the Setup menu, it is available to Level 10 users only.

To start, log in to OU Campus and navigate to **Setup > Tags**.

Adding Tags

1. From the tags list view, click the green **New** button.
2. Notice how the type “Tag” is automatically selected in the dropdown.
3. Type in “biology” in the Name field and click **Create**.
4. Repeat this process to create the tags “chemistry,” “physics,” and “geology.”

Collection of tags

1. From the tags list view, hover over the “science” tag and select **Edit** option.
2. Notice how the type “Tag” is automatically selected in the dropdown.
3. Select the down arrow to reveal the “Collection” option.
4. Notice how the new field “Tags” appears.
5. In this field add the tags “chemistry,” “physics,” and “geology” and click **Save**.

1. Still in the tags list view, hover over the “science” Collection and select **EDIT** option.
2. Now add the tag “biology” and “someotherology” and click **Save**.
3. Notice how you can add existing tags or create new tags while editing a Collection.

Disabling Tags

1. Create the tag “disable.”
2. In tags list view, hover over the “disable” tag and select the **Disable** option, confirming your choice in the dialogue box that appears.
3. Note how it is now greyed-out.

Merging Tags

1. Create the tags “literature,” “Shakespeare,” and “English.”
2. Select all three of them by clicking the checkbox on the side.
3. In the top bar, note the options that have appeared, and select **Merge**.
4. In the dropdown **Merge Tags Into**, make sure “English” is selected.
5. Merge tags.

Directory Access Settings

Settings can be configured for directories that control what tags users are allowed to assign to files within those directories. These are available to Level 10 and 9 users.

To begin, navigate to **Content > Pages > academics**, and locate the directory, “science,” within the academics directory.

Tag Access Settings

1. In pages list view, hover over the science directory and hover over **Edit**. Select “Tags Access” from the dropdown menu.
2. Note the **Update Options**. Here is where you can choose to edit the settings for the directory either recursively or non-recursively.
 - a. Non-recursive modification, where the settings are applied only to pages created going forwards, is configured by selecting the option “Apply All Settings to This Folder Only.”
 - b. Recursive modification, where the settings are applied to all existing files within the directory as well as any in the future, is configured by selecting “Apply Selected Settings to This Folder and All Enclosed Files and Folders.”
 - c. Select the option for recursive modification. A dropdown now appears labeled “Apply Method.” Note the two options in the dropdown – “Add to existing tags” will simply add all changes to existing tags, whereas “Overwrite existing tags” will replace any existing settings with the ones currently being configured.

Fixed Tags

These are tags that are automatically applied to files within the folder and cannot be deleted. To add a tag, simply type into the field and select it from the list that appears. For this workshop, add the fixed tag “science.”

Filtered Tags

Filtered tags restrict the tags that users may add to files within the folder by either allowing only certain tags or disallowing certain tags. Tags and collections are added by typing into the field and selecting from the dropdown. Adding a collection either allows or disallows all tags within that collection. For this workshop, add the “science” as filtered tags and select “Allow Only These Tags” below. Note the little number besides “science” that indicates how many tags are in the collection.

Save changes to exit the modal.

Applying Tags to Pages

Tags applied to individual pages allow for them to be searched for more easily within OU Campus. Note that tags applied directly to pages will stay with the page even when it is moved to another location, whereas tags that are applied through the directory settings (such as fixed tags) will not.

1. Navigate inside the science directory to index.pcf
2. Check out the page, hover over to reveal the **Edit** menu, and select **Properties** from the dropdown that appears.
3. Note the “Tags” field that is now present under **Page Parameters**, under **Title and Metadata**. Within the “Tags” field, see how the “science” tag is present and cannot be removed.
4. By typing into the field, add the “chemistry” tag.

5. Once again, type into the field and add a tag that was *not* included in the “science” collection. Note how the interface does not allow you to do that.
6. Navigate back to pages list view and out of the “science” directory.
7. Select another page in another directory, check it out, and add a tag that is not among those already configured, such as your name. Tags can be created simply by adding them to pages unless otherwise blocked.
8. On this same page, attempt to add the tag “disable.” Note that the interface does not allow you to do so.

Applying Tags to Binary files

Tags applied to binary files like documents and images allow for them to be searched for more easily within OU Campus. Note that tags applied directly to the files will stay with the files even when it is moved to another location, whereas tags that are applied through the directory settings (such as fixed tags) will not.

1. Navigate inside the `_resources/images/home/gallery` directory.
2. Check out the image `gallery-1.jpg`, hover over to reveal the **Edit** menu, and select **Properties** from the dropdown that appears.
3. Note the “Tags” field that is now present under **Page Parameters**.
4. By typing into the field, add the “chemistry” tag.
5. Repeat this for a couple more images in the directory.

Searching for Content/Files

1. Return to the pages list view.
2. The Filter bar is in the top right corner. Click the black Tag icon and see how a list of all available tags comes up. Select the tag “chemistry.”
3. The index page will now appear. It is also possible to filter within a tag; for example, if there were multiple pages tagged “chemistry,” typing in the filter field would only search among those.
4. Select this page in the result list, then select the green Main Content button.
5. Enter a few sentences of content. Now select the insert image icon, then the browse option next to source field.
6. In the select image modal, navigate to the images directory.
7. Next, in the filter by tag field enter “chemistry” and select an image from the list.
8. Fill in the Description.
9. Lastly, ensure the Constrain proportions checkbox is checked then change the first Dimension value to 350. And click okay.

Adding Meta Keywords

1. Return to the pages list view at the root of the site.
2. Navigate to `/workshop-tag-management` directory
3. Copy the `tag-management.xsl` to folder `_resources/xsl`
4. Navigate to this folder, `_resources/xsl`
5. Edit the page `common.xsl`
6. On line 16 type the following: `<xsl:import href="tag-management.xsl" />`
7. Then, on line 38 type the following: `<xsl:call-template name="meta-keywords" />`

8. Save the page.
9. Navigate to the academics/science directory, and publish the index.pcf file.
10. When prompted: select the view in new window link at the bottom of the screen.
11. Right-click and view-source.
 - a. On line 8 you should see `<meta name="keywords" content="science,chemistry" />`