Luminis Platform
Content Administration Training Workbook

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SUNGARD HIGHER EDUCATION

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Content Management

Course goal

The goal of this course is to provide you with the knowledge and practice to successfully configure your university's portal.

Course objectives

By the end of this course, you should be able to

- create targeted announcements
- create targeted content channels
- describe published channels
- mange fragments
- administer layouts
- configure permissions management
- create filter groups
- administer groups
- manage access groups, roles, and users.

Overview of Luminis Platform

Luminis Platform can be used to target information to your campus community based upon individual interests and characteristics. When users log into the portal, the content is dynamically displayed and personalized with their name and interests. If a person updates his/her address, intended major, or interests, the updated information is fed back to Banner or your institution's student information system.

Training Scenario

Your role

Throughout this workbook you will be asked to complete a variety of exercises. You will perform the role of a content manager who is responsible for managing and monitoring the portal. These exercises will walk you through the processes and steps associated with the them. Specifically, you will be

- creating targeted announcements
- defining a target audience
- creating channels with content relating to prospects
- establishing who can perform what tasks within Luminis Platform.

Prior to completing the exercises, take a few minutes to consider your institution's portal goals. Identify one channel for which you could develop content and refer to it when completing each exercise.

End User Overview

Section goal

This section will introduce you to the basics of organizing a layout in the role of a student. Then you will see how a content manager can create a targeted announcement in Luminis and how to utilize group functionality.

Section Objectives

After completing this section users will be able to

- customize the end user layout
- add, move and delete channels, tabs, & columns
- add and move fragments
- reset a layout
- specify the default active tab
- describe targeted announcements.

Scenario

Your institution will be deploying Luminis Platform in the coming months. You will set up layouts that contain information geared towards students to test the system properly. After you have configured layouts, you will create an announcement targeted to a specific audience as a further test of the layout.

Components of the Luminis Layout

After logging into the portal, you are presented with a layout, customized with information pertaining to your role and interests. If you have attributes such as being an Arts and Sciences major or you are involved with intramural athletics, then your layout will show information relating to those characteristics. This is setup automatically by the content administrator at the institution.

At the highest level, **fragments** are targeted at users based upon their role or interests at the institution. Fragments are the whole set of information contained below the banner in the portal.

These fragments consist of **tabs** which are lower level containers of content.

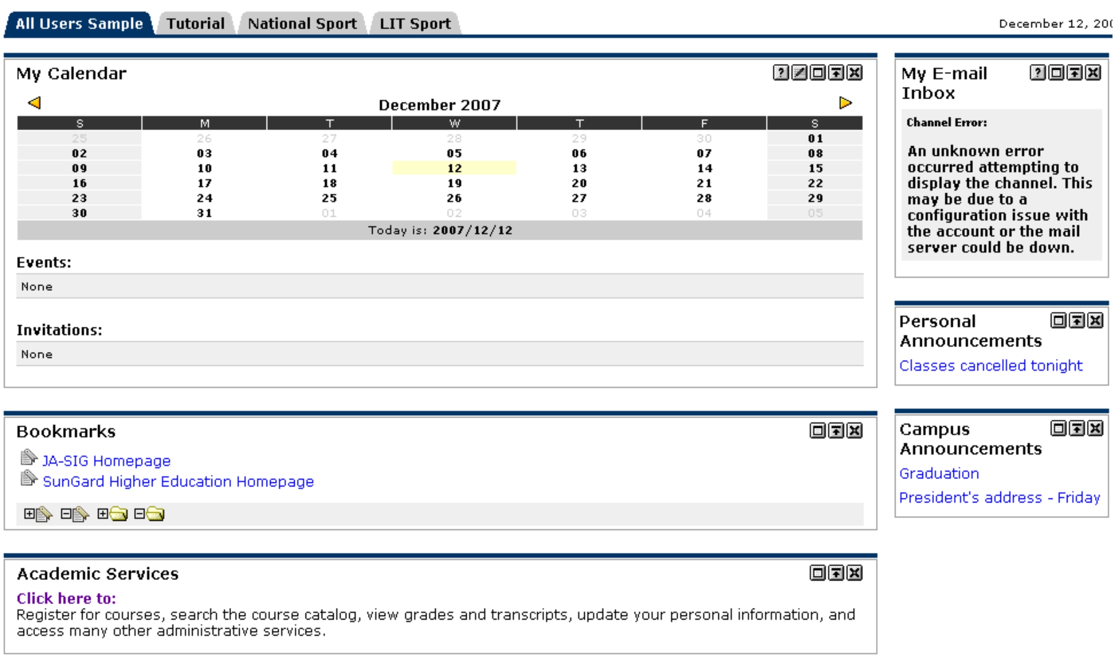
Tabs consist of either **Targeted Content Channels** or **Published Channels**.

- **Published Channels** are targeted based on user's role, interests, and characteristics.

- **Targeted Content Channels** are also targeted, by **section**, based on user's role, interests, and characteristics. Sections divide a channel into areas that can be set to display to certain users based upon attributes you define.

  Subsections deliver content in Targeted Content Channels, and are displayed under Section headers.

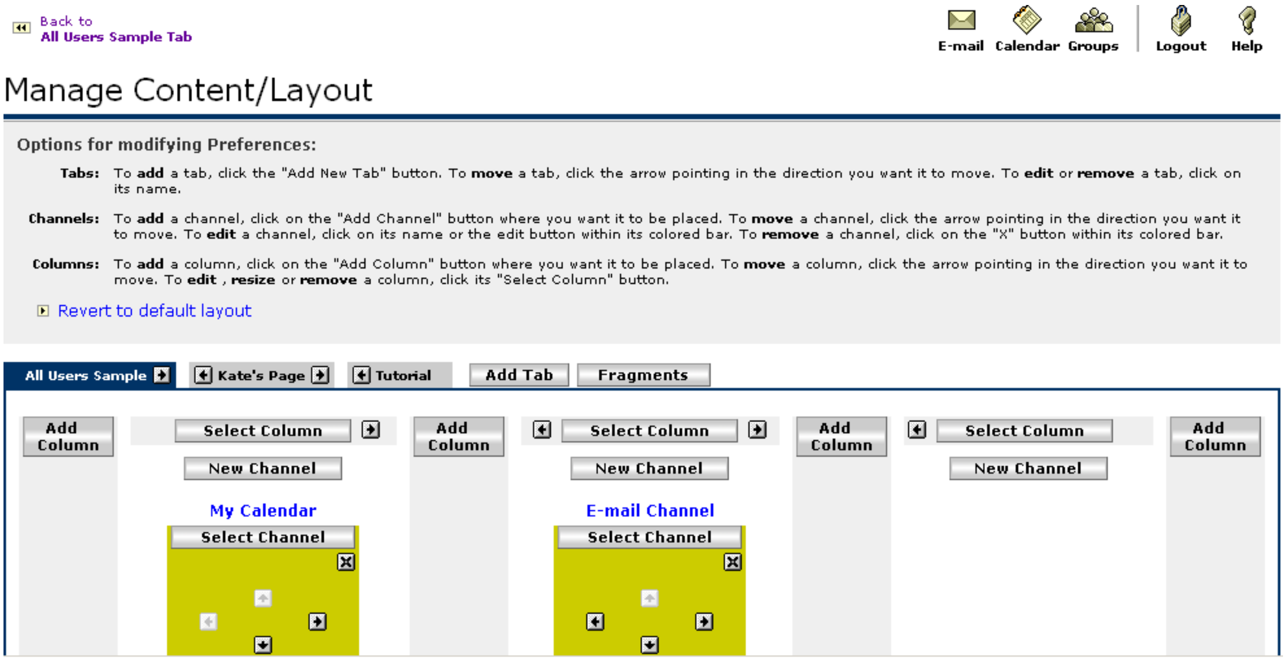
Note: A tab may include a mixture of Targeted Content and Published Channels.



Adding, moving, and deleting channels, tabs, & columns

To modify tab and channel properties or to add new tabs and channels to the layout, you must access the Manage Content/Layout page by clicking on the **Content Layout** link located to the left of the welcome greeting on your homepage.

Note: Depending on how your institution has implemented the system, you may not be able to perform all of these layout changes on every tab or channel.



Modifying Elements

Modify elements using the following buttons:

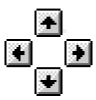
The **Add Tab** button allows you to add a new content tab to your layout.

The Fragment tab allows you to subscribe to tabs with predefined sets of channels, such as a tab for athletics and recreation. The number of optional fragments available to you will be determined by your institution.

The **Add Column** button allows you to add a new column to the layout of a selected tab.

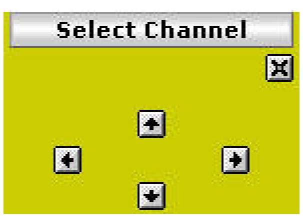
The **Select Column** button allows you to select a column to move horizontally in the layout of a selected tab or to adjust the widths of the columns in a tab.

The **New Channel** button allows you to add a new channel to the selected tab in a specified area.


The directional arrows allow you to move a tab horizontally in the display, a column horizontally in a given tab, and a channel horizontally or vertically across columns or vertically within a column.

Other Layout Features

In addition to these buttons, the layout provides a schematic of each channel that is contained on the selected tab:



In addition to providing the ability to move the channel horizontally or vertically, you can delete the channel from the tab by clicking the icon. To select the channel to edit it, click the icon. You will then see a list of options allowable for the channel, such as changing the height of a channel window.

Note: Depending on how your institution has chosen to implement the system the icon on some channels may be inactive. If the icon is inactive you will be unable to delete that channel from your interface. Likewise, other layout features may be inactive or missing altogether.

Adding a tab

By default, the system provides great flexibility for you to customize the tabs and channels in your layout. One of the options you have is to create new tabs and populate them with channels.

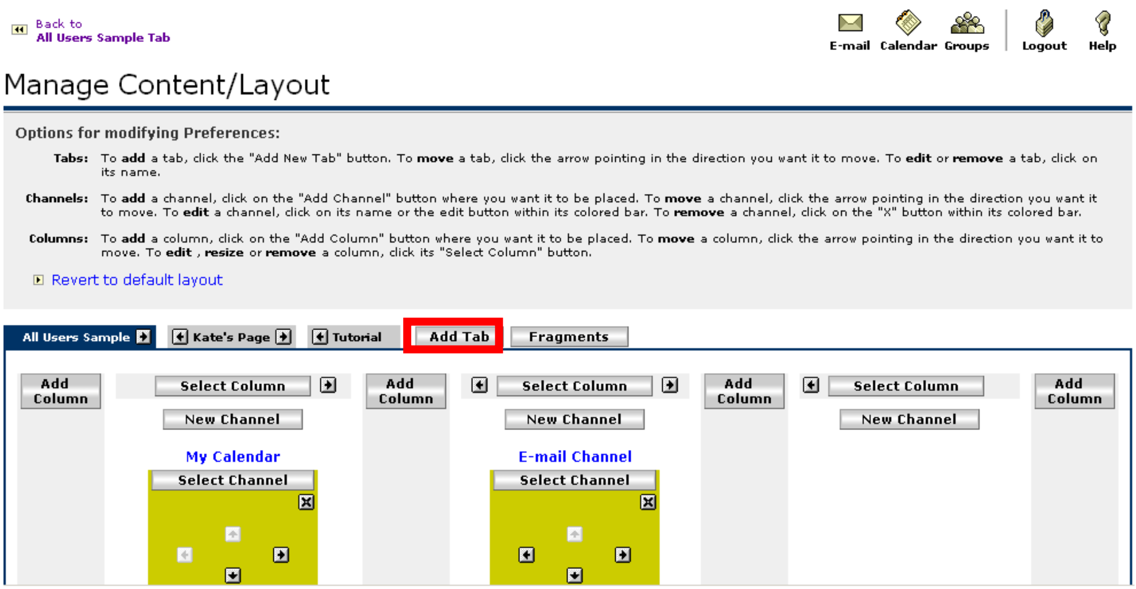
Steps

To add a tab:

1. Click on the **Content Layout** link.

Note: You see the Manage Content/Layout page, which allows you to change aspects of your user layout, such as adding tabs, moving or deleting channels, etc.

2. Click the **Add Tab** button.



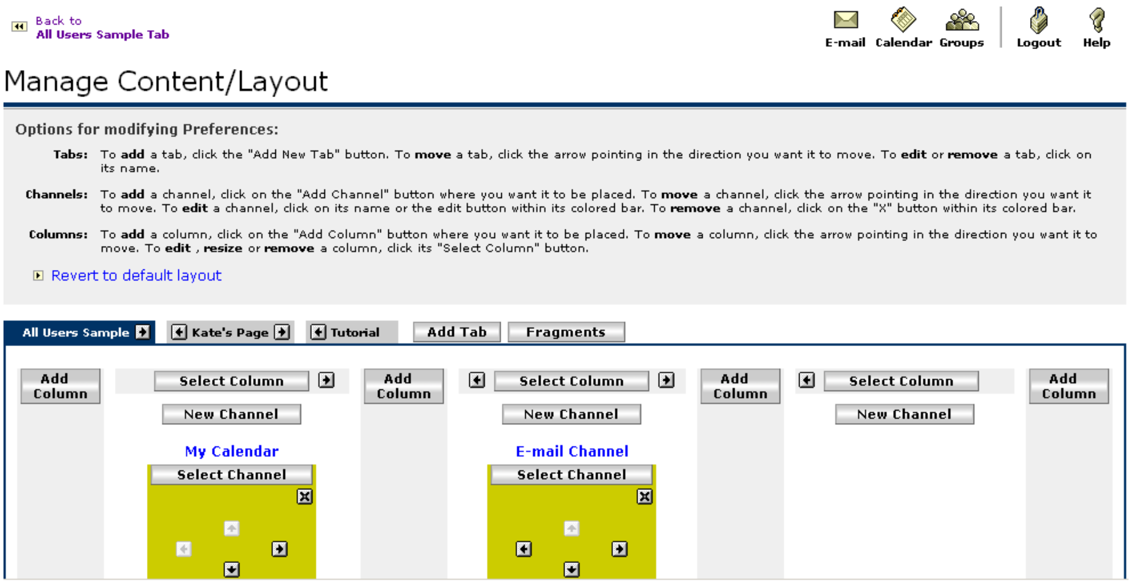
Note: Under the Manage Content/Layout page title you see a list of steps for adding the tab, which includes the following options:

Name the tab: Allows you to supply a name for the new tab

Select the type: Allows you to specify one of two types of tab content: Traditional, which presents channelized content in columns, or Framed, which allows you to fill the tab with the content of a specified URL

Select a position for the tab: Allows you to set the order of the tab in the layout in relation to other tabs. Depending on how your institution has configured the system, some tabs may be locked and therefore unmovable.

3. To edit a tab, click on the tab name to select it.



4. To modify the tab, fill in these fields as appropriate and click the button next to the option if necessary. You are returned to the Manage Content/Layout screen.

5. To modify the horizontal position of the tab, click on the directional arrows on the tab as displayed in the black and white relief.

6. Click the **Cancel and return** button to exit without modifying the tab.

Exercise

Add a tab to your layout and title the tab **Library**.

Adding Columns

If your institution has configured the system to allow it, you may have the ability to add or delete columns or to move columns on a tab.

Steps

To add a column:

1. Click on the **Content Layout** link.

2. Select the tab to which you want to add a new column by clicking its name.

Note: You see a relief containing icons for the existing channels and columns contained on the tab.

3. Locate the position where you want to add the new column and click the **Add Column** button.

Note: You will see the Manage Content/Layout page with options that allow you to set the relative sizes of each column that the tab will contain.

4. Enter percentage values for each column in the column width fields.

Note: The combined total of all fields should equal 100%.

5. Click the **Submit** button to set the column widths.

Note: You will see the Manage Content/Layout page with the new column displayed in the black and white relief on the layout.

Modifying Columns

If your institution has configured the system to allow it, you may have the option to change the number and/or rearrange the position of the columns on a given tab.

Steps

To modify a column:

1. In the top left-hand corner of the page, locate and click the **Content Layout** link.

Note: You will see the Manage Content/Layout page, which allows you to change aspects of your user layout, such as adding tabs, moving or deleting channels, etc.

2. Select the tab on which you want to modify columns.

Note: You see a relief containing icons for the existing columns contained on the tab.

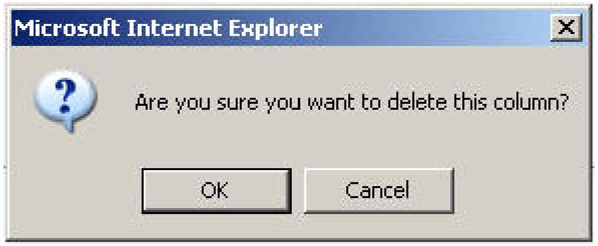
3. To move a column horizontally in the display, click the left or right directional arrow next to the **Select Column** button.

4. To delete a column, click the **Select Column** button. The column now displays within a colored background indicating that it has been selected.

5. From the list of options provided, click **Delete this column** option. (Your institution may specify that some columns cannot be deleted)

Note: You will see the Manage Content/Layout page with the black and white relief on the layout, now without the column you deleted.

6. Click the **OK** button.



Note: You will be returned to the tab where you elected to modify the column. From now on when you log on, you will see the modifications on this tab.

Add Channels

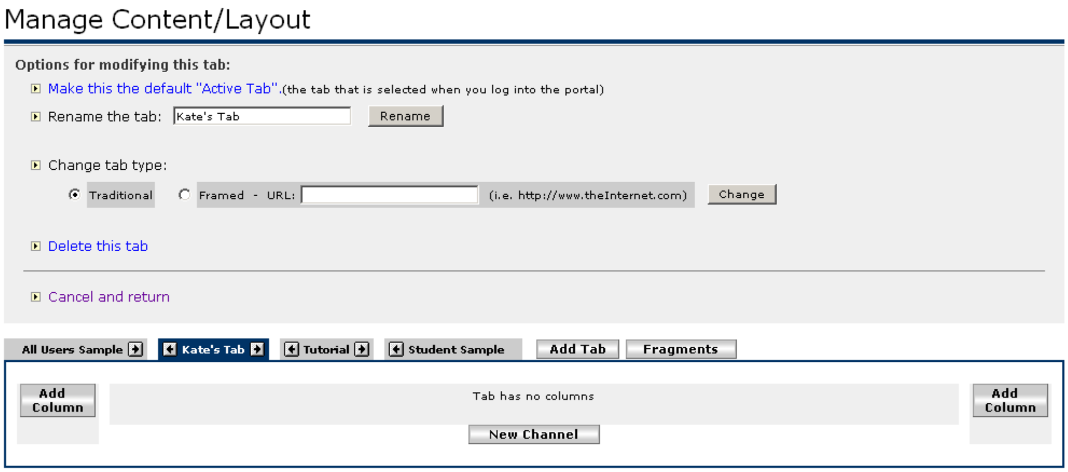
By default, the system provides great flexibility for you to customize the tabs and channels that you have in your layout. One of the options that you have is to add new channels to existing tabs or to new tabs that you have created, in order to add additional information or content to your portal view.

Steps

To add a channel:

1. Click the **Content Layout** link.

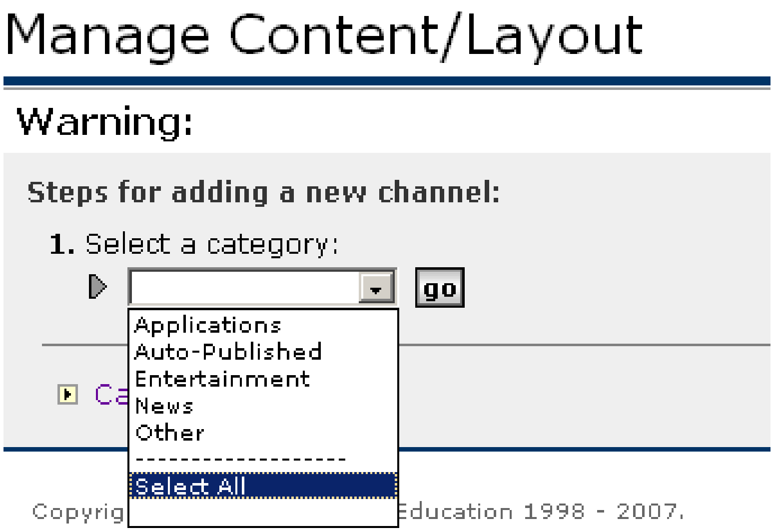
2. Select the tab to which you want to add a new channel by clicking its name.



Note: You see a relief containing icons for the columns and channels contained on the tab.

3. Click the **New Channel** button.

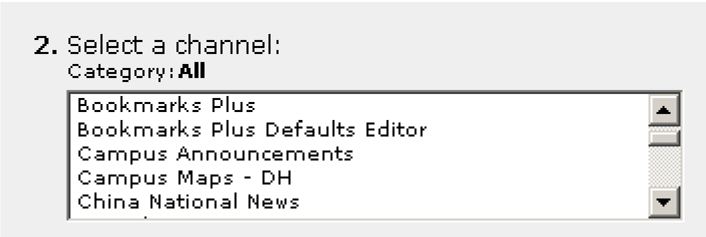
4. Select a category from the menu.



Note: If you are presented with a subcategory menu, select from it as appropriate. You'll see a second menu box.

5. Click the **go** button.

6. Choose the channel to add in the **Select a channel** field.



7. Click the **Add Channel** button.

Note: You are returned to the tab where you elected to add the channel. From now on when you log on, you will see the new channel on this tab.

Exercise

Add a column to the Library tab, then add the **Schedule New Targeted Announcement** channel to the column.

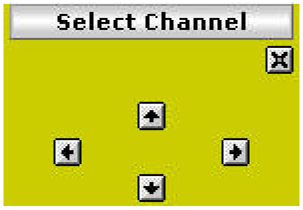
Modifying Channels

If your institution has configured the system to allow it, you may have the option to move the position of a channel on a given tab, delete channels, or even move channels to new tabs.

Steps

To modify a channel:

1. Click the **Content Layout** link.
2. Click on the name of the tab with the channel you want to modify.
3. Use the arrows in the channel icon to move a channel horizontally or vertically on the same tab.



4. Click the  icon on the channel icon to delete a channel.
5. Delete the channel from the original tab and then add it to the other tab to move a channel to another tab.

Adding and Moving Fragments

If your institution has configured the system to allow it, you may have the option to add additional tab groupings, known as fragments, to your layout. Fragments allow you to add a logical grouping of channels quickly. For example, some institutions may create an Athletics fragment that recruits or students may choose to add to their portal view, while others may create a Managers fragment with information for supervisors, managers, and directors.

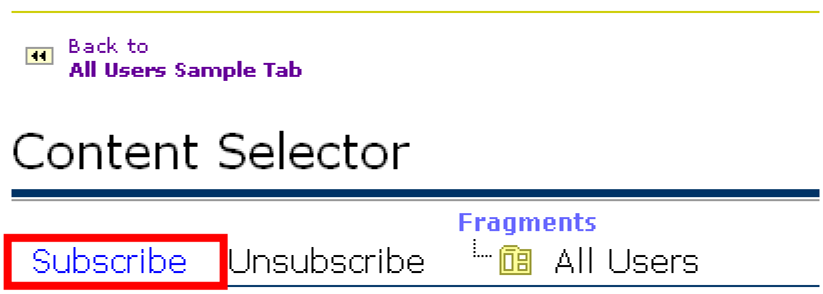
Steps

To add and move fragments:

1. Click the **Content Layout** link.

2. Click the **Fragments** button.

3. Click the **Subscribe** link for the name of the fragment you want to subscribe.



1. Select the red arrow of your choice to position the new fragment in relation to the other tabs in your layout. Click the **Return** button to go back to your layout.

Using the Layout Reset Function

If you make changes to a layout and decide you would like to go back to how the layout was before the changes, use the layout reset function.

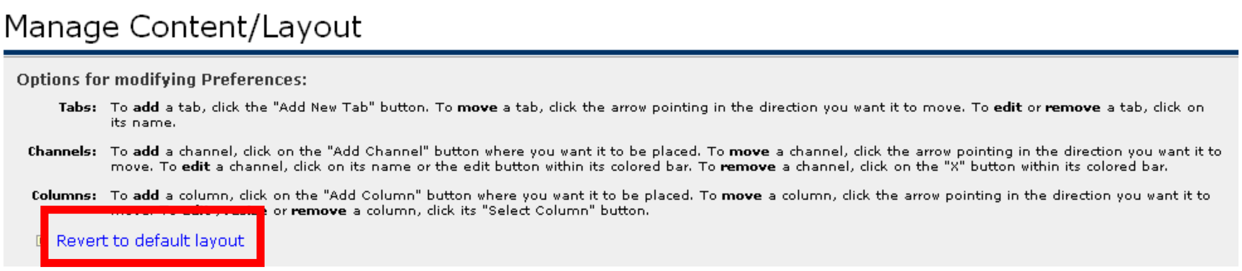
Note: Some institutions may disable this functionality.

Steps

To reset a layout:

1. Click the **Content Layout** link.

2. Click the **Revert to default layout** link.



Note: Using this function will delete all customizations you have ever made to your portal layout and is irreversible. As such, you should use this with extreme caution.

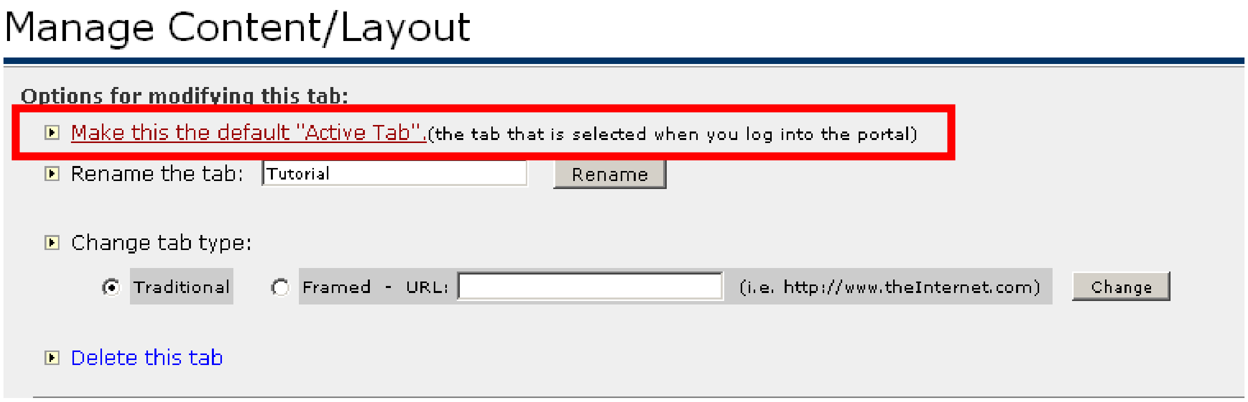
Specifying the Default Active Tab

The Active tab setting allows you to set the tab as the one which will open when you log in to the system, if your institution allows this.

Steps

To specify the default active tab:

1. Click the **Content Layout** link.
2. Select the tab you want to make active.
3. Click the **Make this the default "Active tab"** link.



Exercise

Make the **Library Tab** the default active tab.

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

Where is information within targeted content channels stored?

a. Section

b. Subsection

c. Tab

d. Column

Question 2

What link is clicked to add a channel to the layout?

a. Content Layout

b. Portal Admin

c. Admin

d. My Account

Answer Key

Question 1

Where is information within targeted content channels stored?

a. Section

b. Subsection

c. Tab

d. Column

Question 2

What link is clicked to add a channel to the layout?

a. Content Layout

b. Portal Admin

c. Admin

d. My Account

Creating Targeted Announcements

Section goal

In this section, you will see how to create a targeted announcement. An example of a targeted announcement would be an invitation to a special biology department lecture to biology students.

Section objectives

At the end of this section, you should be able to

- select the capacity
- specify the message subject, delivery date, and distribution method
- define the target audience using the Expression Editor

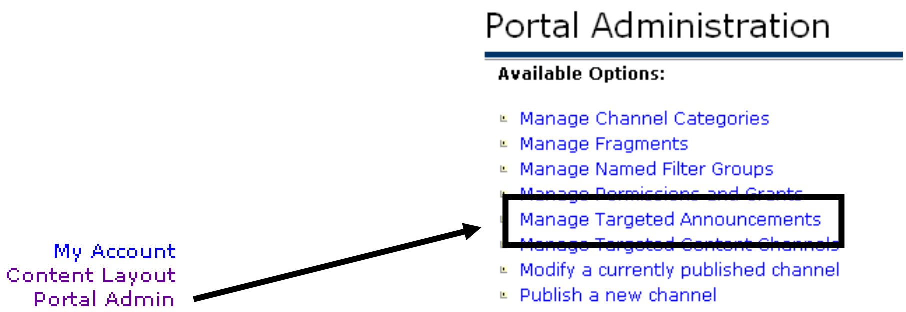
Scenario

Although a small number of announcements may be appropriate for all prospects, more frequently you would use targeted announcements to provide information to a subset of your population. In this scenario, you will send a targeted announcement to only those students that are interested in biology, in relation to a special biology department lecture.

Understanding Targeted Announcements

Targeted Announcements are delivered in the Luminis Platform interface in two channels, one each for **Campus Announcements** (which are delivered to all your institution's Luminis users) and **Personal Announcements** (which are sent to users based on specific attributes, such as their role, major, or membership in a group that meets specific criteria). In many institutions' layouts, these channels appear on the home tab, the active default tab that appears when the user logs in.

Targeted Announcements are created and managed within the Portal Admin Center.



Note: Personal Announcements for members of online communities or classes can also be created within the Group Studio and Course Studio applications and will be discussed in those contexts in this workbook.

All Luminis Platform users receive campus announcements via the Campus Announcements channel. Personal announcements, delivered in the Personal Announcements channel, are meant for specific groups of Luminis users based on attributes defined before the announcement is sent. All announcements remain accessible via the channel until a) the announcement expires or b) an end user deletes the announcement from the channel manually.

By default, announcements of both types have a *send date* consisting of the day the announcement is composed and an *expiration date* set to be seven calendar days from the composition date. Both dates can be adjusted manually at the time the announcement is composed or edited/resent. The personal announcement type can be sent to the Personal Announcement *channel* as well as to the user's *email address*.

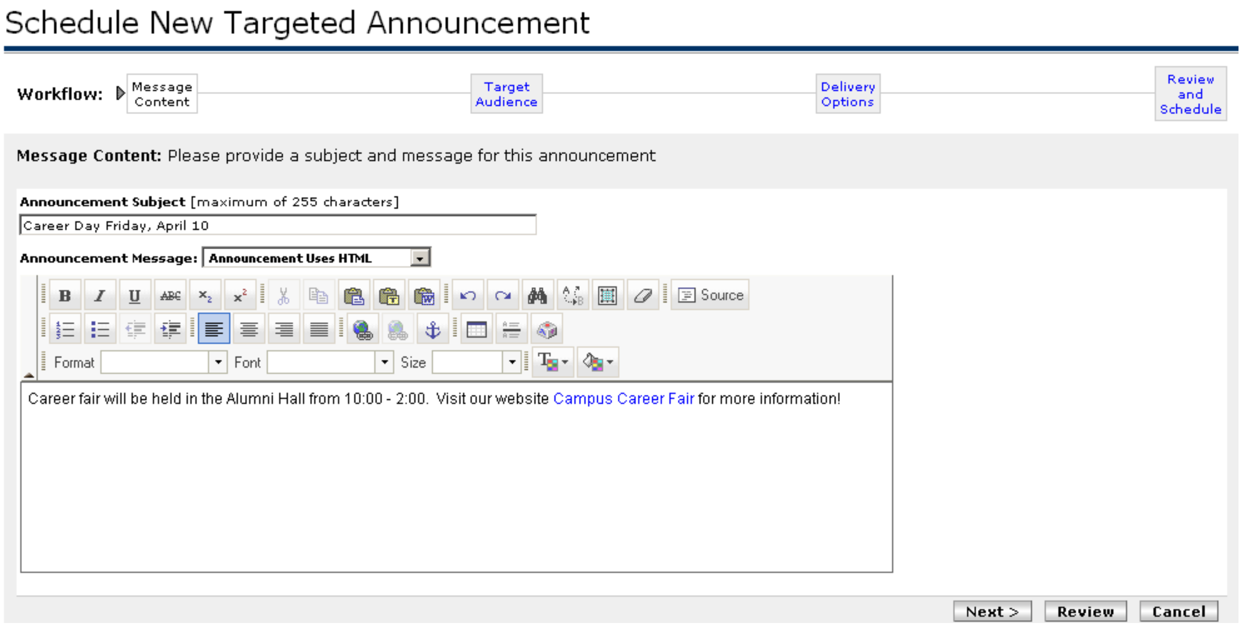
Designated Announcement administrators can also edit and resend announcements and can delete specific announcements from end-users' channels. Personal announcements sent as email, however, can only be edited and resent, NOT removed from the email system once sent.

Personal Announcement Procedure

Steps

To add a personal announcement:

1. Click the **Portal Admin** link.
2. Select the **Manage Targeted Announcements** link.
3. Click the **New Announcement** button.
4. Enter the Announcement Subject and Announcement Message and click the **Next** button.



Note: The message will support simple text formatting via HTML tags. It will also render full URLs (e.g., http://www.sungardhe.com) as clickable links if you have not used HTML tags elsewhere in the body of the message.

The following are fck editor options available on the toolbar:

- **Format:** Bold, Italic, Underline, Strike Through, Subscript, and Superscript
- **Edit Content:** Cut, Copy, Paste, Paste as Plain text, and Paste from Word

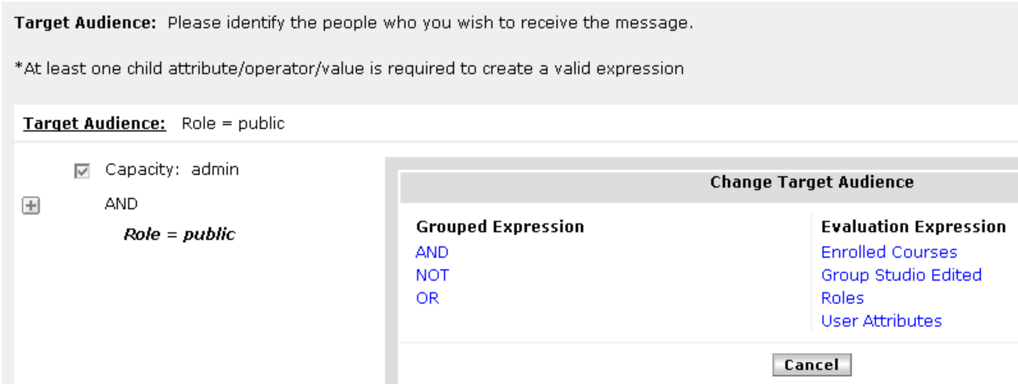
- **Objects:** Undo, Redo, Find, Replace, Select All, and Remove Formatting
- **Page:** View Source
- **Ordering:** Numbered List, Bulleted List, Decrease Indent, Increase Indent
- **Justify:** Justify Left, Justify Center, Justify Right, Justify Block
- **Link:** Insert Hyper link, Remove Hyper Link, Insert or Edit Anchor
- **External Objects:** Insert or Edit table and Insert Special Character
- **Styles:** Format Text, Change Font, and Change Font Size
- **Color:** Text Color and Text Background

5. Select the audience you are going to use, either imported groups or choose the refine audience option:

Imported Groups: This option, available only to users who are in the Admin Access Group, lists any imported groups that may be available for use in your system. Announcements targeted at an imported group will be delivered to the Personal Announcement channel or through e-mail to the users who belong to the group.

Refine Audience: This option allows you to define criteria for your target audience using standard Boolean operators (AND, NOT, and OR) and elements from the following expression filters:

- Enrolled Courses, which provides a list of all the active courses for the current term that have been imported into the Luminis Platform;
- Group Studio, which provides a list of all the active public or restricted online groups that have been created in the Luminis Platform through the Group Studio application;
- Roles, which provides a list of all the roles or access groups that are maintained through the Luminis Platform, such as prospect, student, faculty, or alumni;
- User Attributes, which provides attributes that are unique to a user such as date of birth, major, or home institution.



Note: Refer to the Defining Targeted Audience via Expression Editor section for further information on defining the audience for announcements.

1. Click the **Next** button.
2. Set the Delivery and Expiration Dates (as needed) then click the **Next** button.
3. When you are finished, click the **Schedule Announcement** button.

Re-sending Targeted Announcements

There may be occasions when you must make a change to a Targeted Announcement that you have already sent. In this situation, the easiest solution is to revise the original message, send the revised copy of the message, and delete the original message.

This procedure will replace the original message in the Personal Announcements channel with your revised version of the message; however, this procedure does not delete the original message from recipients' e-mail Inboxes. The procedure for resending a Campus Announcement is similar to the steps listed below.

Steps

To re-send a targeted announcement:

1. Navigate to the Manage Targeted Announcements screen.

2. Click the title of the announcement you want to re-send.

3. Click the **Edit and Reschedule** button.

4. Revise the information to be edited and click the **Review** button.

5. When you have finished modifying the announcement's attributes, click the **Schedule Announcement** button.

6. The Personal Announcements list will re-appear, now showing both the original and the re-sent announcements.

Note: The newer announcement will appear above the older one in the Personal Announcements list and will have a higher **ID** number than the original.

Note: To ensure that only the most recent announcement appears in users' Personal Announcements channel, **delete** the older version.

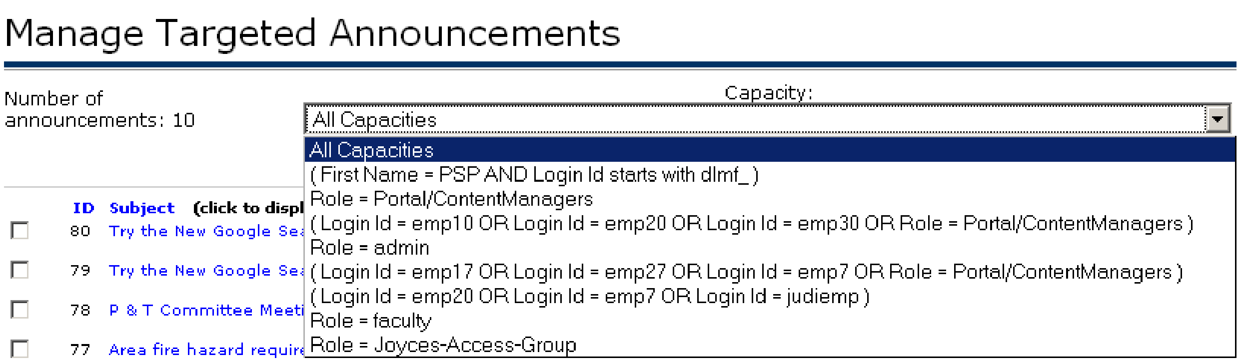
Selecting Capacity

Users who create targeted announcements could have multiple capacities, such as sending announcements only to a certain region or sending announcements only to students in the study abroad program. Users with multiple capacities must select their capacity before sending an announcement to their target audience.

Steps

To choose a capacity to send targeted announcements:

1. Select the **Portal Admin** link.
2. Click the **Manage Targeted Announcements** link.
3. Select the capacity from the **Capacity** field.



In most cases, the capacity you select will determine the targeting options available to you when you generate the announcement. This will depend, however, upon how your institution has defined the permissions associated with each capacity.

Exercise

Schedule a Targeted Announcement that notifies biology students of a biology department guest lecture on October 1, 2008.

Defining Targeted Audience via Expression Editor

For a Single Role

The following screen shots are designed to capture some common scenarios for creating target audiences for targeted announcements, channels, or layout fragments and for granting administrative permissions within Luminis.

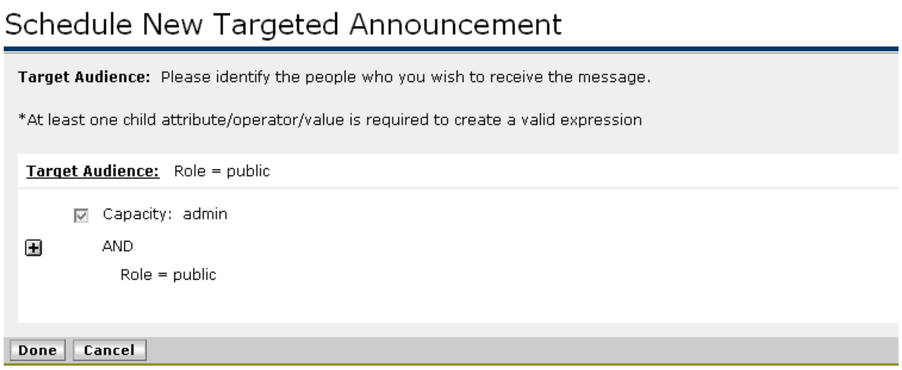
Access the expression editor in the Target Audience step of the Create Targeted Announcement process. In this step, click the **Refine Audience** button to define the target audience.

Example: Students

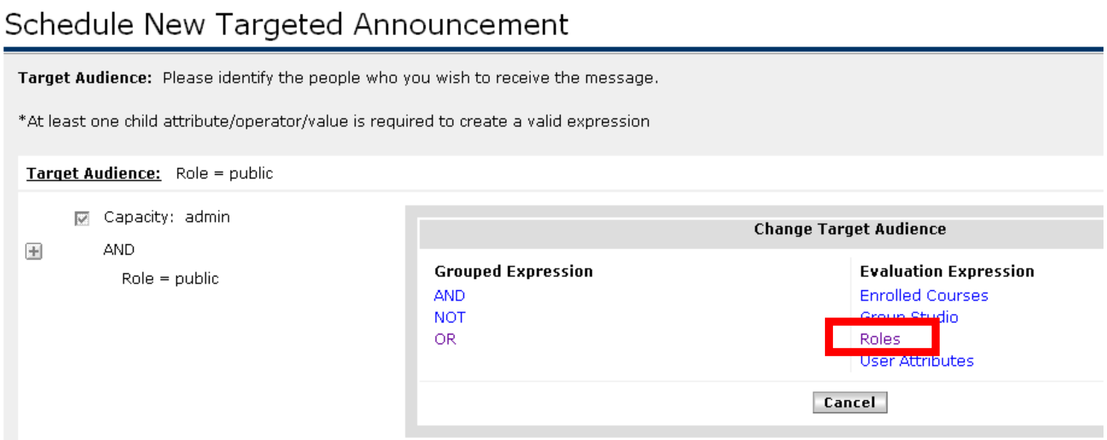
Steps

To select accepted prospects as the target audience for a targeted announcement:

1. Click the + sign next to the **AND** operator.

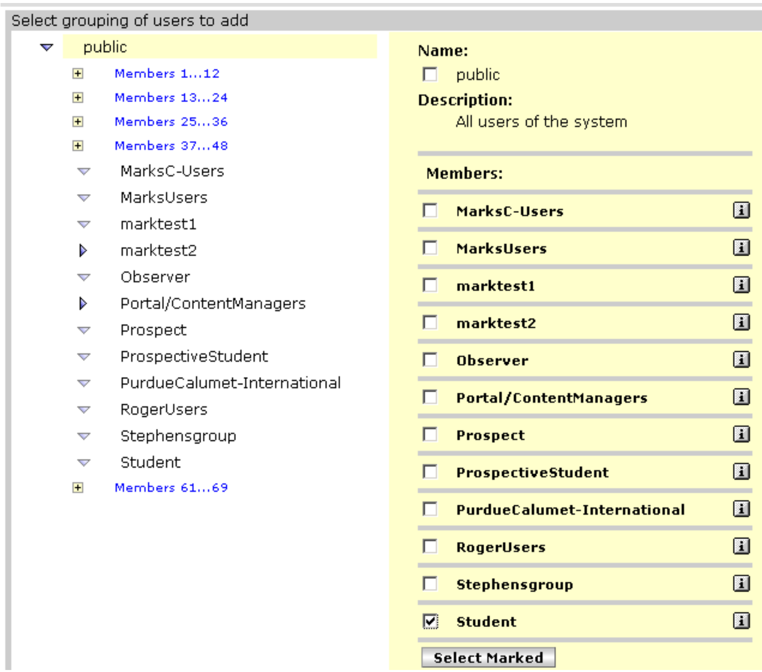


4. Click on the **Roles** link.



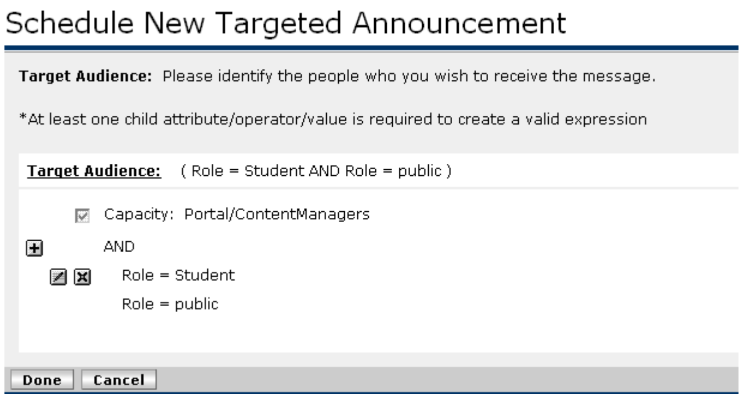
5. Navigate through the list of Roles and choose the one you want (in this case, Students)

- click the check box next to the role you are targeting.
- click the **Select Marked** button.
- click the **Done** button.



6. In the end, your logic should look like this. The **AND** operator will return users who have the **public** and the **Student** role.

Note: **Public** will always be there as a base role.



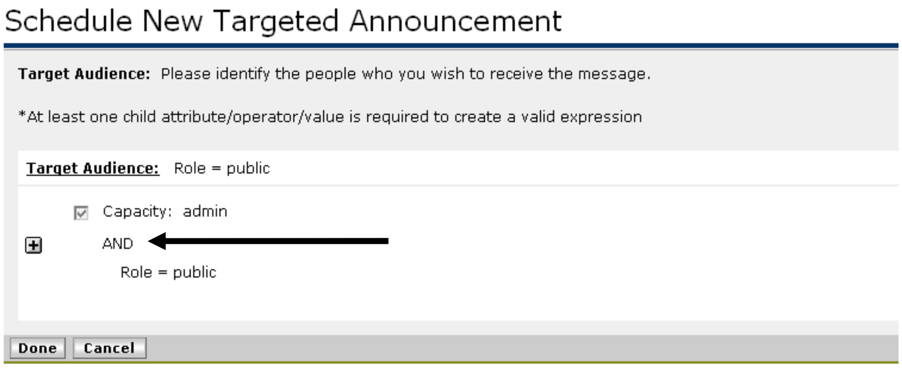
A and B Logic

Examples: Law school prospects who are also alumni of the institution. Students who are also Employees at the institution.

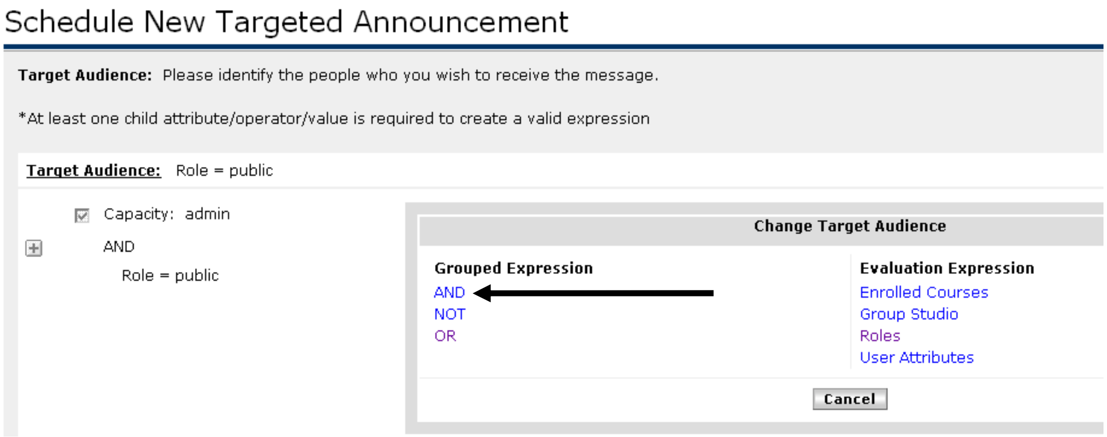
Steps

To setup an audience of Students who are also Employees.:

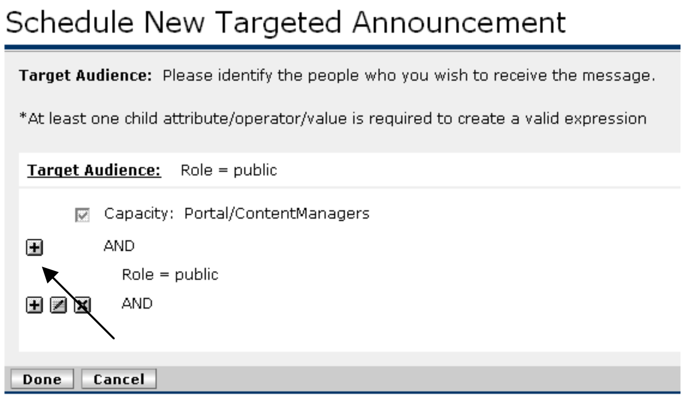
1. Click the + sign next to the **AND** operator.



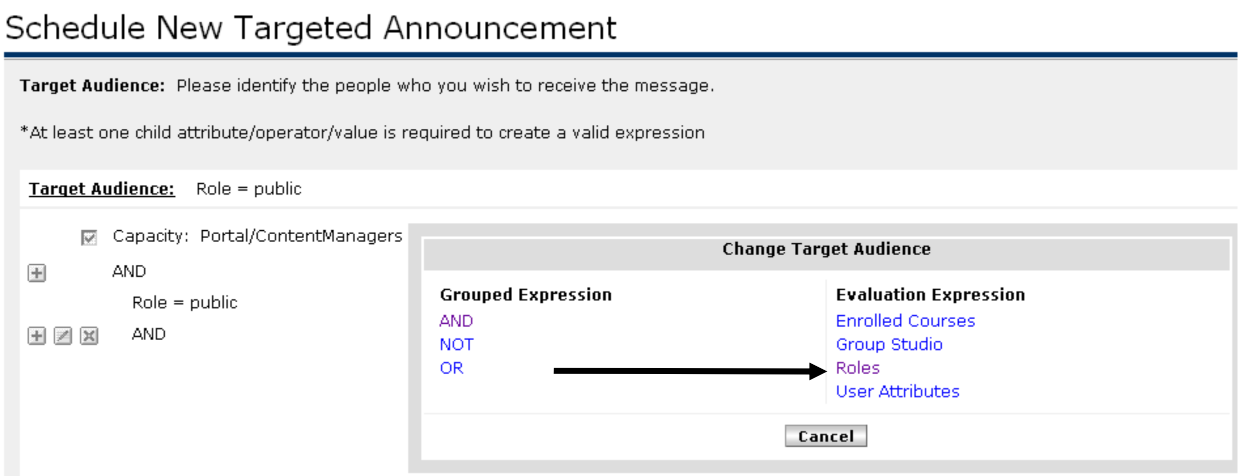
2. Click the **AND** link.



3. Click on the + sign next to **AND**.

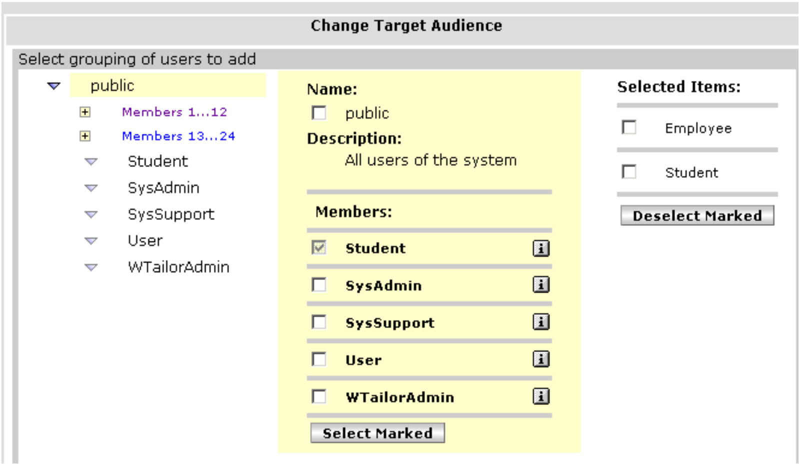


4. Click on the **Roles** link.

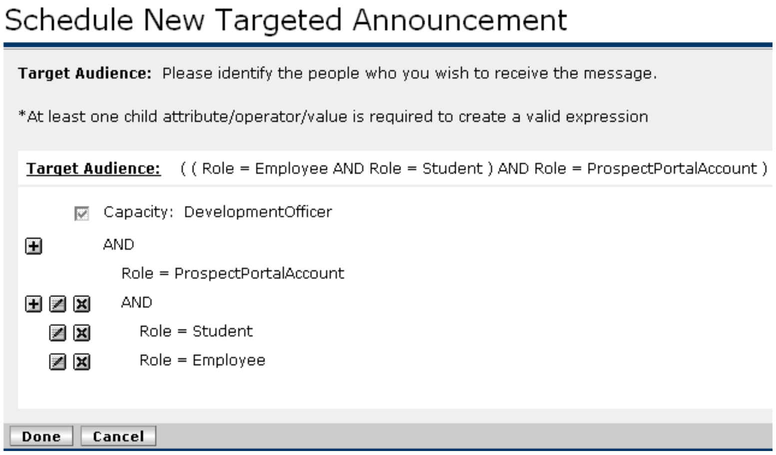


5. Navigate through the list of Roles and choose the one you want (in this case, Students and Employees)

- click the check box next to the role you are targeting.
- click the **Select Marked** button.
- click the **Done** button**.**



6. In the end, your logic should look like this - the **AND** operator will return users who have both the **Student** role and the **Employee** role.

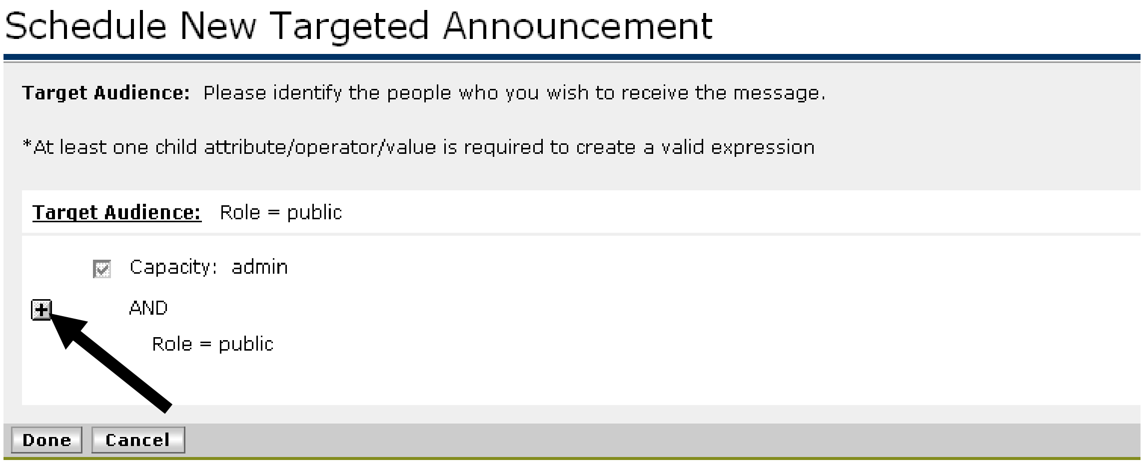


A or B or C Logic

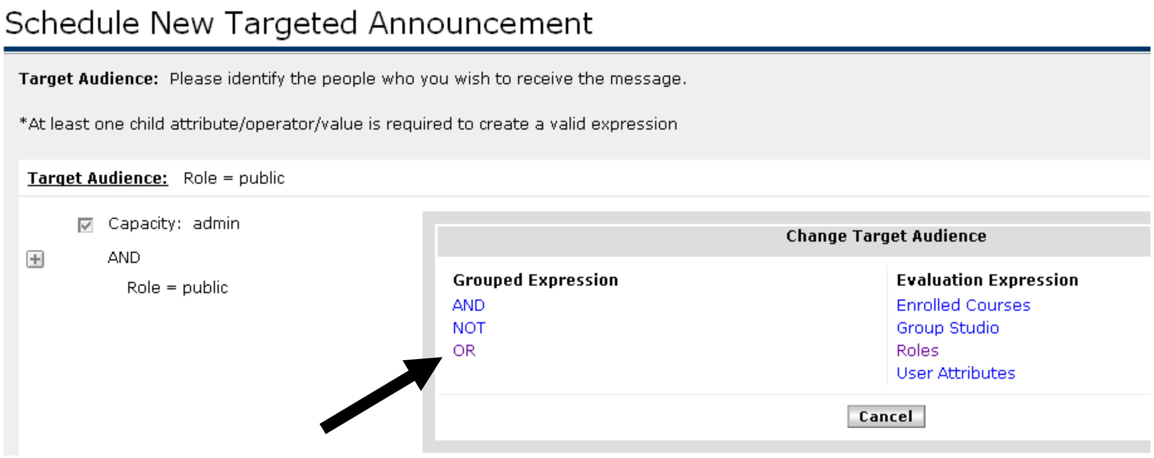
Example: Students from Massachusetts, Vermont, or New Hampshire. In the example below, the announcement goes to Students or Faculty.

Follow these steps to setup Boolean operators to send an announcement to Students or Faculty.

1. Click the + sign next to the **AND** operator.



2. Click the **OR** link.



3. Click on the + sign next to **OR**.

4. Click on the **Roles** link.

5. Navigate through the list of Roles and choose the one you want (in this case, Student or Faculty)

- click the check box next to the role you are targeting.
- click the **Select Marked** button.
- click the **Done** button**.**

6. Click on the + sign next to **OR**.

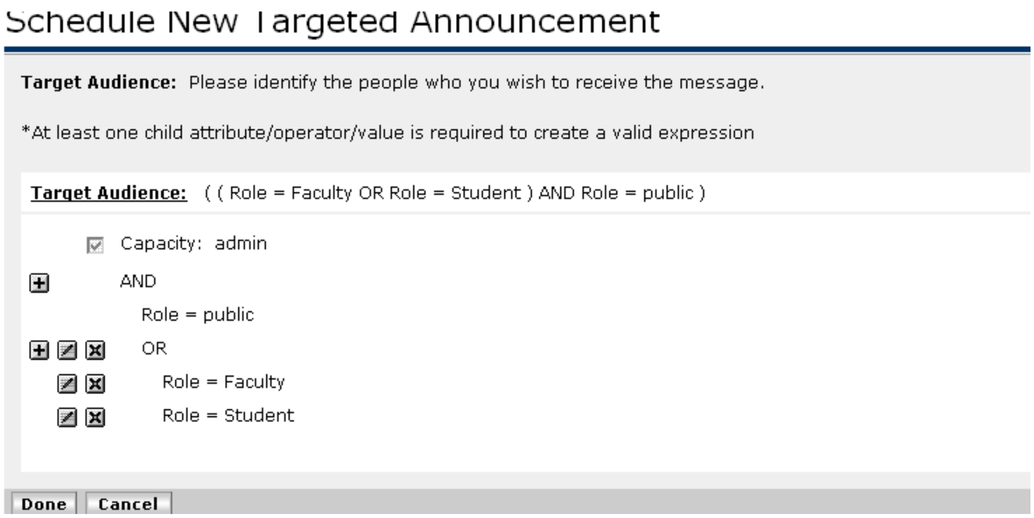
7. Click on the **Roles** link.

8. Navigate through the list of Roles and choose the one you want (in this case, Student or Faculty)

- click the check box next to the role you are targeting.
- click the **Select Marked** button.
- click the **Done** button**.**

9. In the end, your logic should look like this - the **OR** operator will return users who either have the **Student** role and the **Faculty** role.

Note: A common mistake is to use the AND operator when trying to send to two roles; this will result in selecting only those users who have BOTH the Faculty and Student roles (in this example) rather than users with either role.

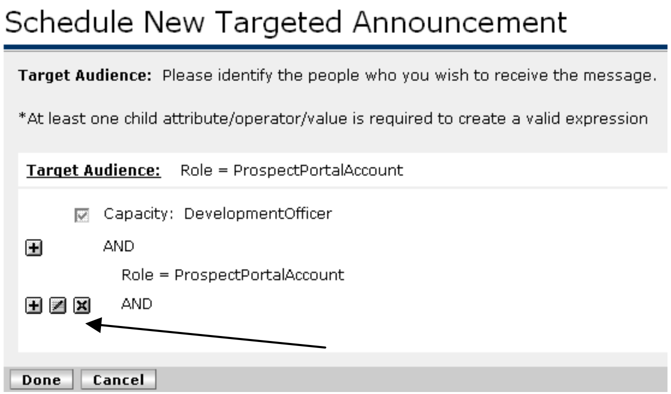


A AND (B or C)

Example: Students who are from either Vermont or New Hampshire. Students who are Biology or Mathematics majors.

Follow these steps to setup an audience of Students who are either Biology or Mathematics majors.

1. Click the + next to the AND operator
2. Click the **AND** link.
3. Click on the + sign next to **AND**.



10. Click on the **Roles** link.
11. Navigate through the list of Roles and choose the one you want (in this case, Student)
    - click the check box next to the role you are targeting.
    - click the **Select Marked** button.
    - click the **Done** button**.**
12. Click the + sign next to the **AND** operator.
13. Click the **AND** link.
14. Click the + sign next to the **AND** operator.
15. Click the **OR** link.

16. Click the + sign next to the **OR** operator.

17. Select the **User Attributes** link.

18. Select **Academic Major**, =, and enter **Biology** in the **Enter Value** field.

19. Click the **Save Attribute** button.

20. Click the **Done** button.

21. Click the + sign next to the **OR** operator.

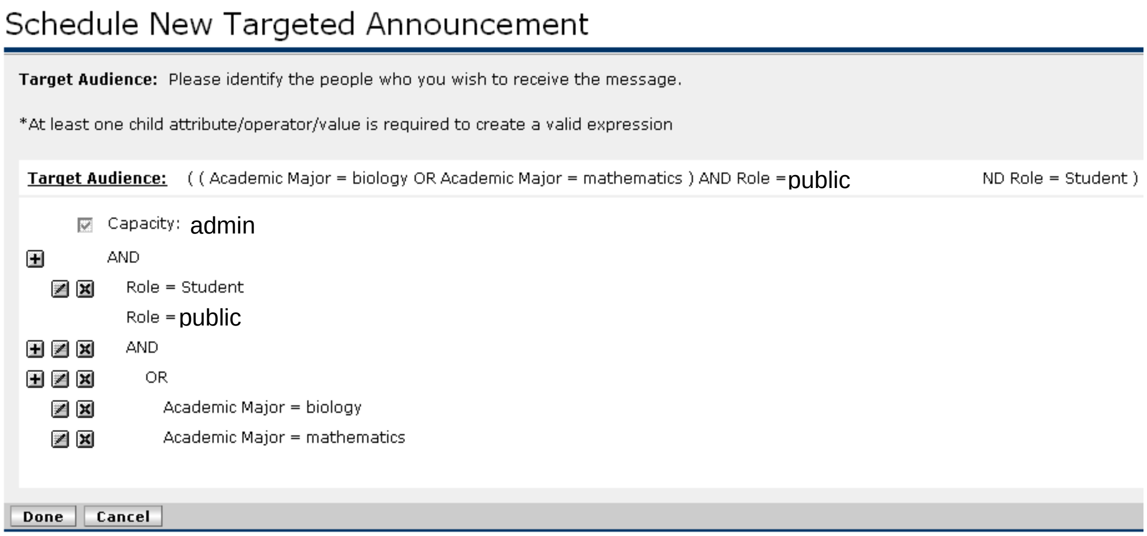
22. Select the **User Attributes** link.

23. Select Academic Major, =, and enter Mathematics in the Enter Value field.

24. Click the **Save Attribute** button.

25. Click the **Done** button.

26. In the end, your logic should look like this - the **AND** operator will return users who have the **Student** role and the OR operator will return **Mathematics** and **Biology** majors.

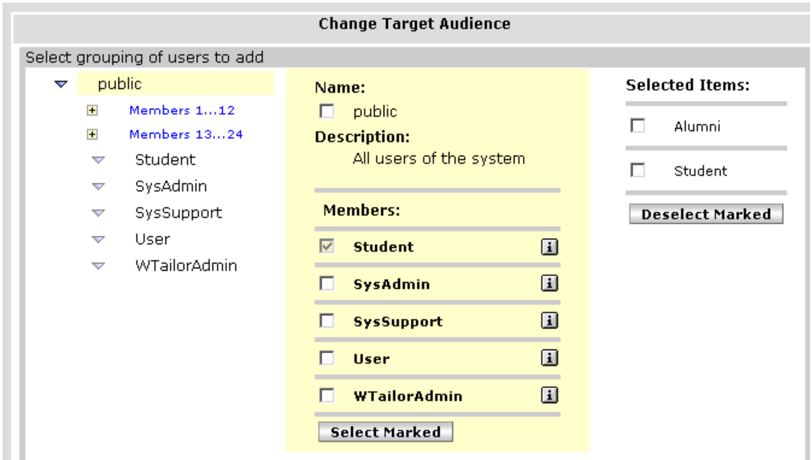


(A or B) AND (C or D)

Example: Students or Alumni who are also either biology or mathematics majors.

Follow these steps to setup an audience of Students or Alumni who are also either biology or mathematics majors.

7. Click the + sign next to the **AND** operator.
8. Click the **AND** link.
9. Click the + sign next to the NEW **AND** operator.
10. Click the **OR** link.
11. Click the + sign next to the **OR** operator.
12. Click the **Role** link.
13. Navigate through the list of Roles and choose the one you want (in this case, Student and Alumni)
    - click the check box next to the role you are targeting.
    - click the **Select Marked** button.
    - click the **Done** button**.**



14. Click the + sign next to the **AND** operator.

15. Click the **AND** link.

16. Click the + sign next to the NEW **AND** operator.

17. Click the **OR** link.

18. Click the + sign next to the **OR** operator.

19. Click the **User Attributes** link.

20. Select the options **Academic Major**, **=**, **Biology**.

21. Click the **Save Attribute** button.

22. Click the **Done** button.

23. Click the + sign next to the **OR** operator.

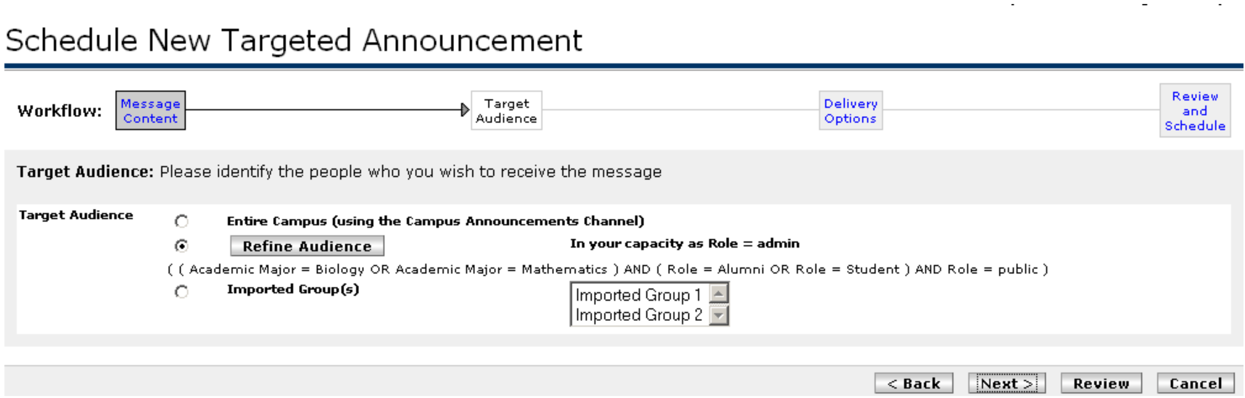
24. Click the **User Attributes** link.

25. Select the options **Academic Major**, =, **Mathematics**.

26. Click the **Save Attribute** button.

27. Click the **Done** button. You will be brought back to the main screen. The Target Audience listed at the top of the screen should be setup so that the audience is Students or Alumni who are Biology or Chemistry majors.

28. Click the **Done** button. You will see the Schedule New Targeted Announcement screen, with the new Target Audience listed.

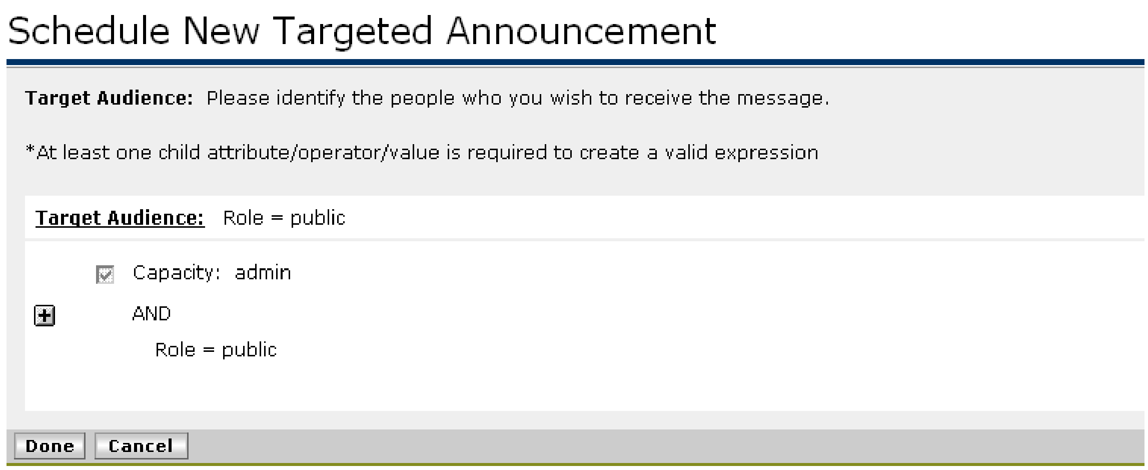


A NOT B

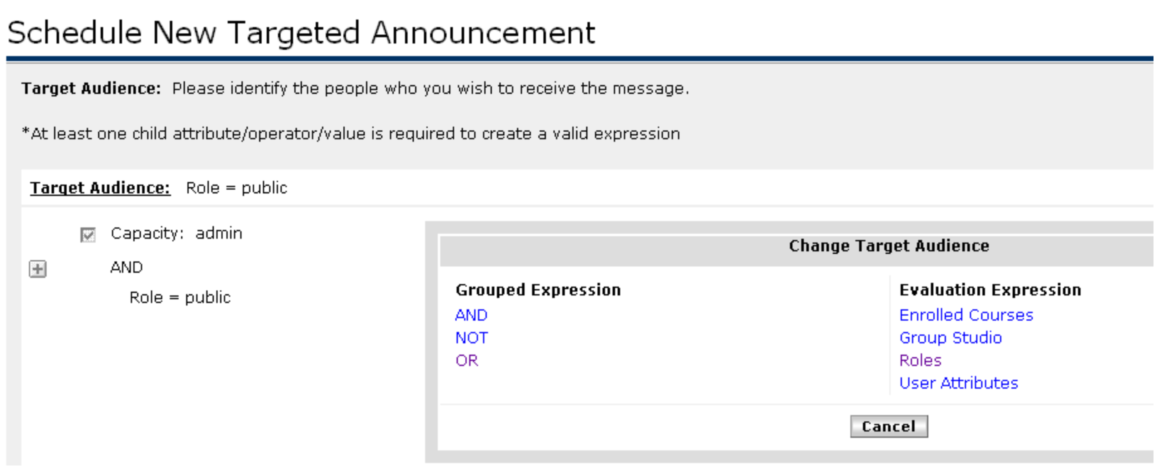
Example: Graduate school prospects who are not current employees of the institution.

Follow these steps to setup an audience of Employees who are not a member of the Faculty.

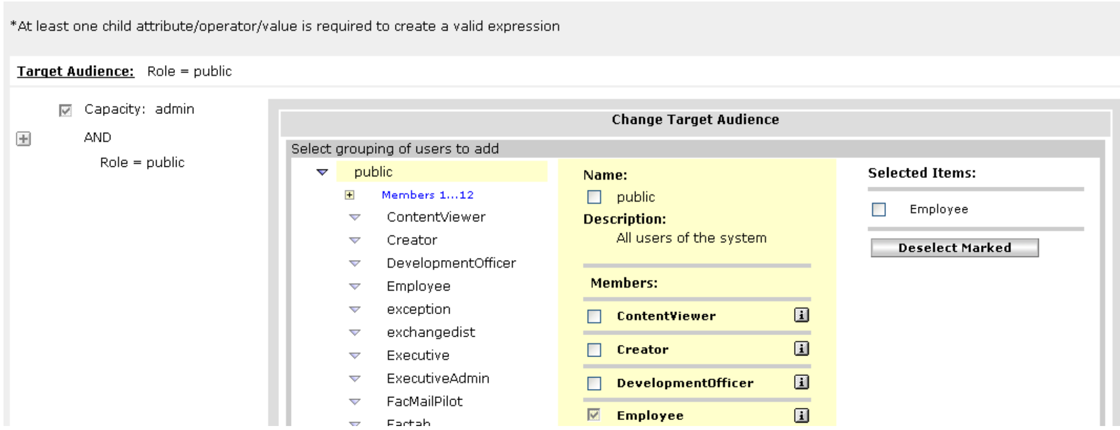
1. Click the + sign next to the **AND** operator.



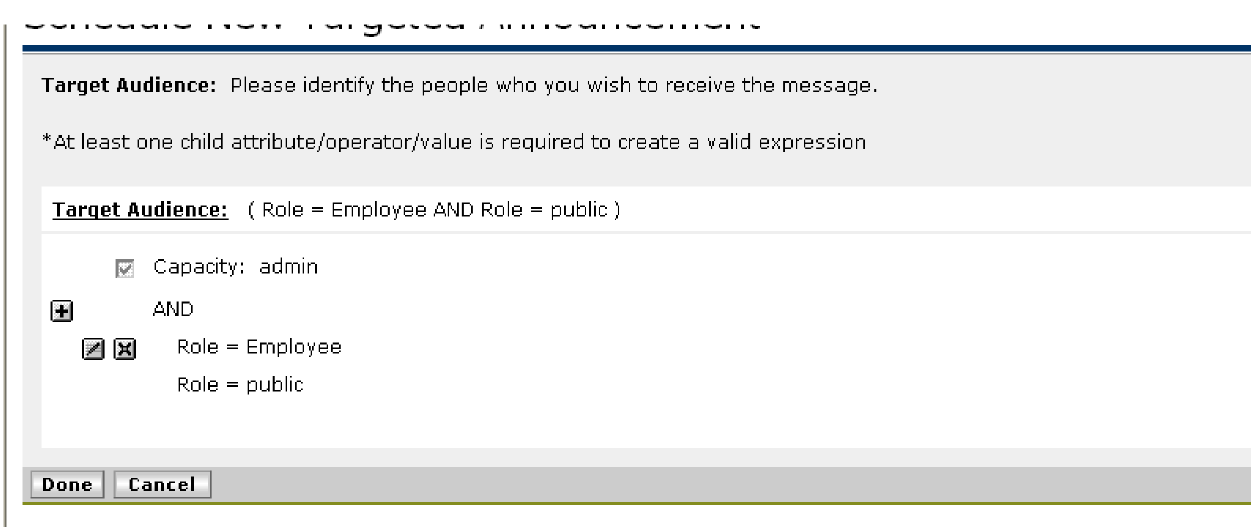
2. Click on the **Roles** link.



3. Select the **Employee** role (don't forget to click **Select Marked** and **Done**).

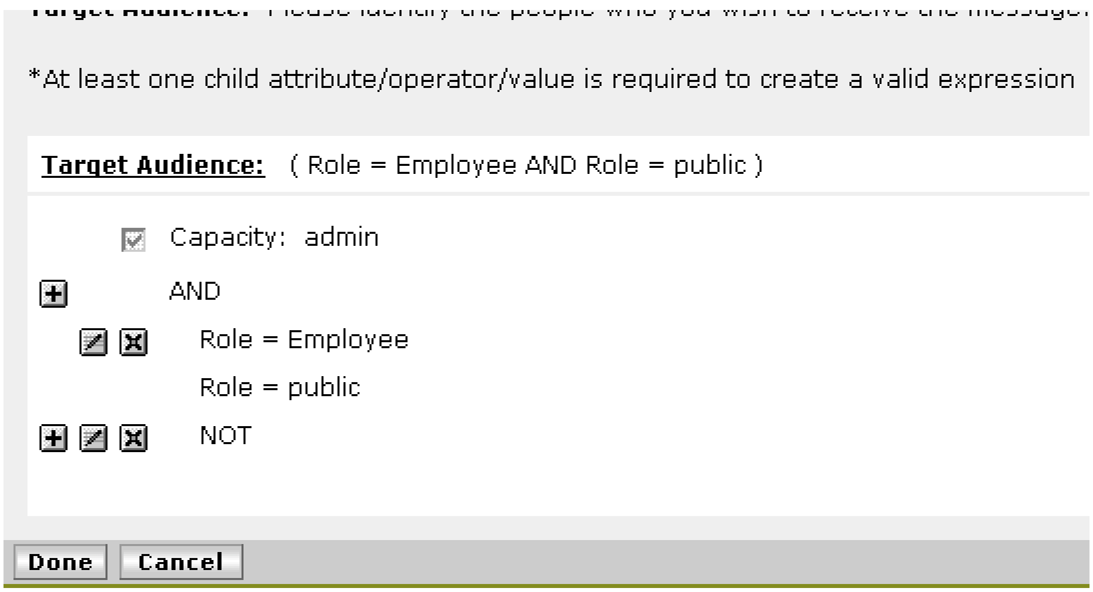


4. Click on the + sign next to the **AND** operator again.



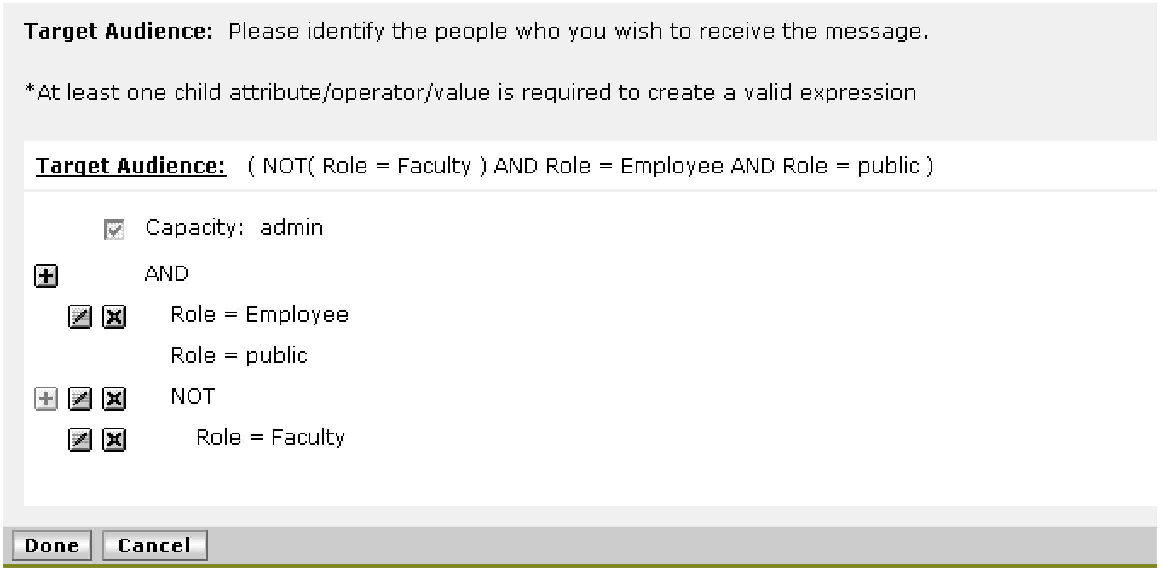
5. Click on the **NOT** link.

6. Click on the + sign next to the **NOT** operator, click on the **Roles** link, and select the Role **Faculty** (don't forget to click **Select Marked**" and **Done**).



7. In the end, your logic should look like this. The **AND** operator will return users who have the **Employee** role, while the **NOT** operator will exclude those who also have the F**aculty** role.

Note: Staff who are adjunct faculty would be excluded in this statement, unless the institution has customized the Luminis faculty role to exclude adjuncts.



Editing and Resending Announcements

After a targeted announcement has been set up, you can edit the contents of the announcement, or re-send the announcement with new variables.

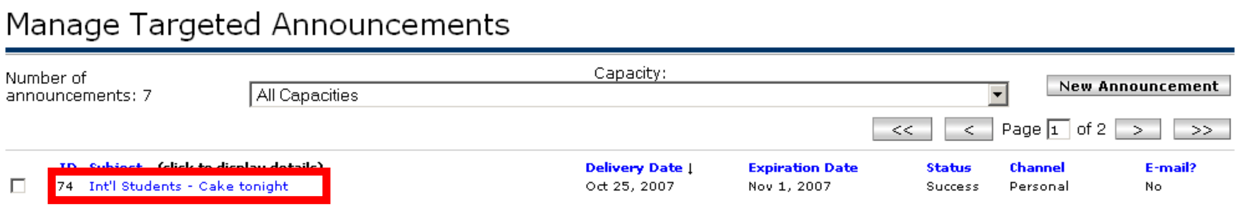
Steps

To edit a targeted announcement:

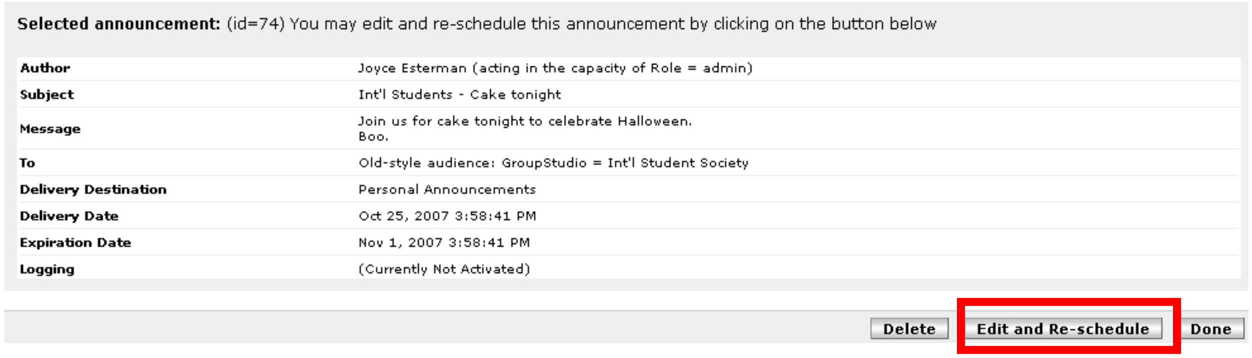
1. Click the **Portal Admin** link.

2. Click the **Manage Targeted Announcements** link.

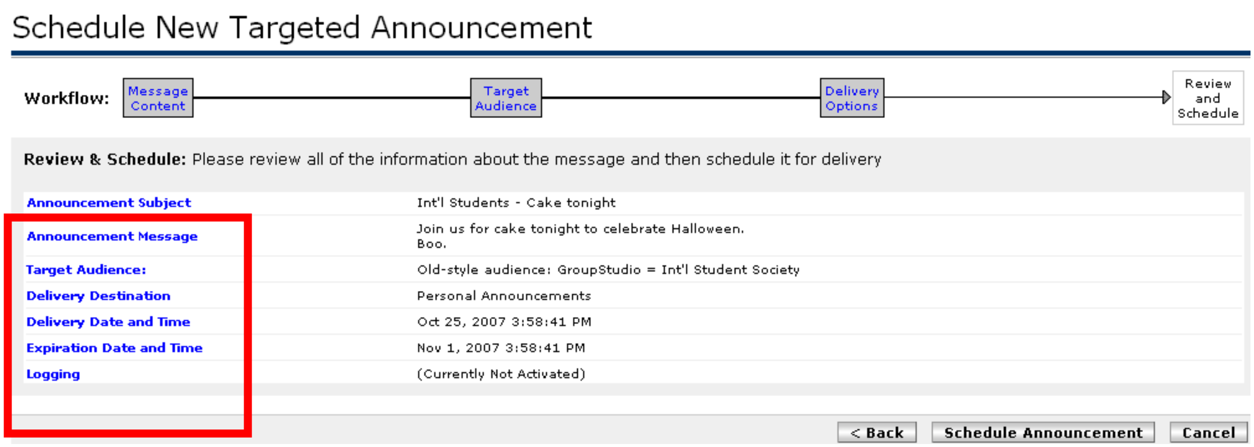
3. Click the announcement you want to edit.



4. Click the **Edit and Re-schedule** button.



5. Click any of the links on the **Schedule a New Targeted Announcement** screen to edit the parameters of the announcement.



6. After the announcement has been edited, click the **Review** button then click the **Schedule Announcement** button.

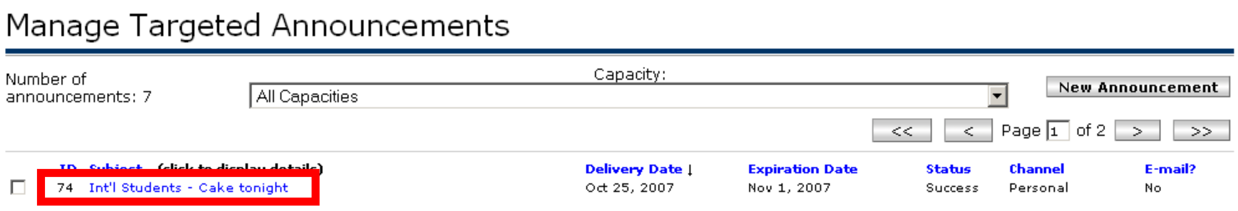
Steps

To re-send a targeted announcement:

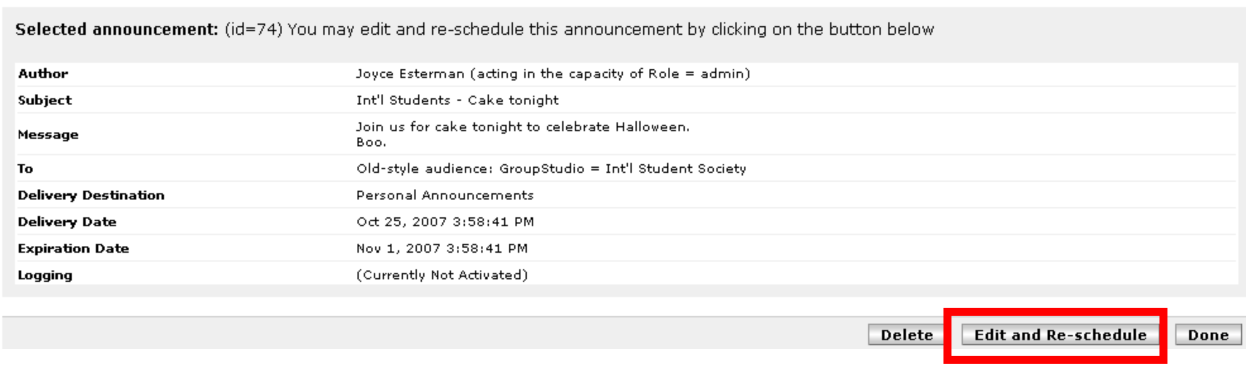
1. Click the **Portal Admin** link.

a. Click the Manage Targeted Announcements link.

2. Click the announcement you want to edit.



3. Click the **Edit and Re-schedule** button.

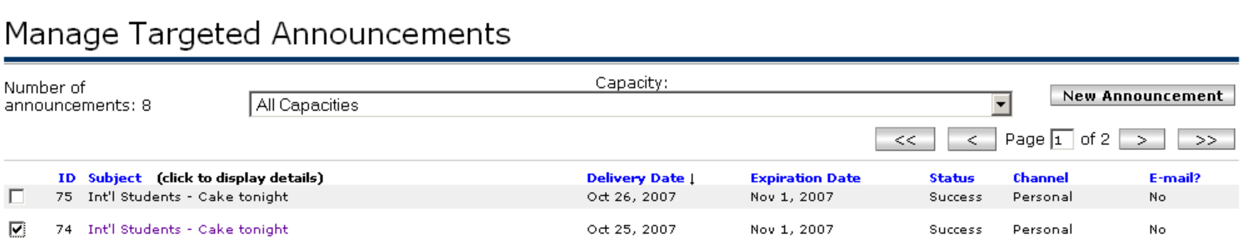


4. Modify the Delivery Date.

5. After the delivery date has been edited, click the **Review** button then click the **Schedule Announcement** button.

6. Click the **Ok** button.

7. Delete the old message from the list by selecting it, then clicking the **Delete** button.



Self Check

Question 1

In the Schedule a targeted announcement screen, which option do you click to use Boolean operators to define the audience for the announcement?

a. Entire Campus

b. Refine Audience

c. Imported Groups

d. Delivery Options

Question 2

Where would you click to re-send a targeted announcement?

Answer Key

Question 1

In the Schedule a targeted announcement screen, which option do you click to use Boolean operators to define the audience for the announcement?

a. Entire Campus

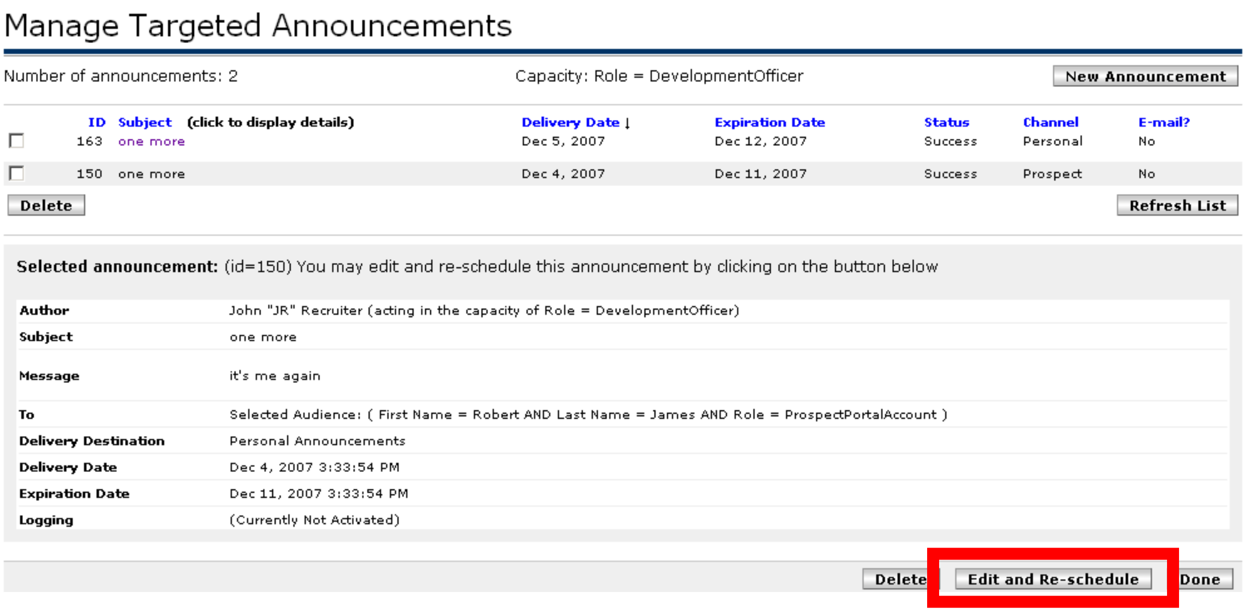
b. Refine Audience

c. Imported Groups

d. Delivery Options

Question 2

Where would you click to re-send a targeted announcement?



Creating Targeted Content Channels

Section objectives

After completing this section you should be able to

- create Channel Categories
- define sections and targeted content
- define subsections
- apply accessibility considerations.

Scenario

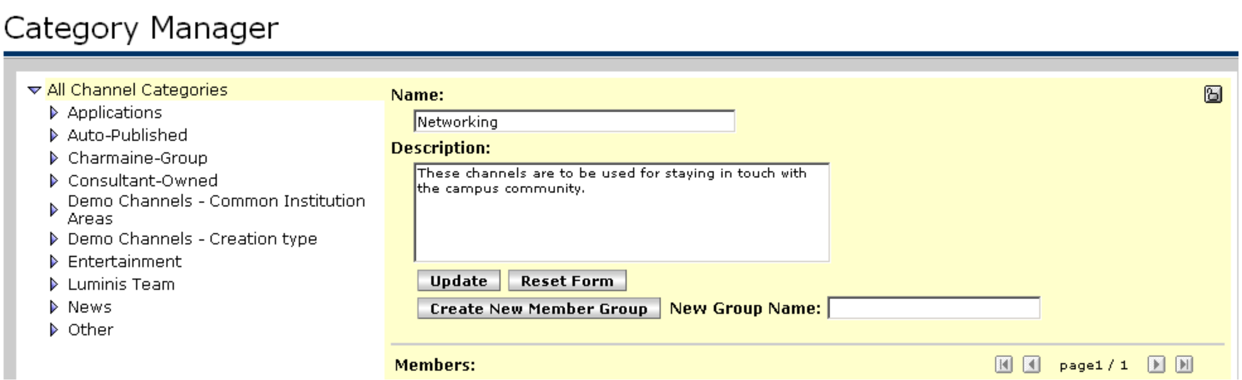
You will use targeted content channels at your institution to post information for users of the Luminis Platform to see. You will create a directory channel so members of your institution can search for contact information of other members of the community.

Channel Categories

Steps

To define channel categories:

1. Select the **Portal Admin** link.
2. Select the **Manage Channel Categories** link.
3. Click the **Edit** button to unlock the channel categories.
4. Enter the New Member Group Name **Networking**.
5. Click the **Create New Member Group** button.
6. Click the **Edit** button again.



Exercise

Create a new Channel Category for **Academic Programs**.

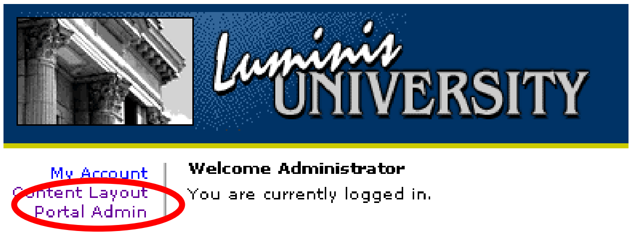
Defining Sections and Targeting Content

This section describes how to create a new targeted content channel.

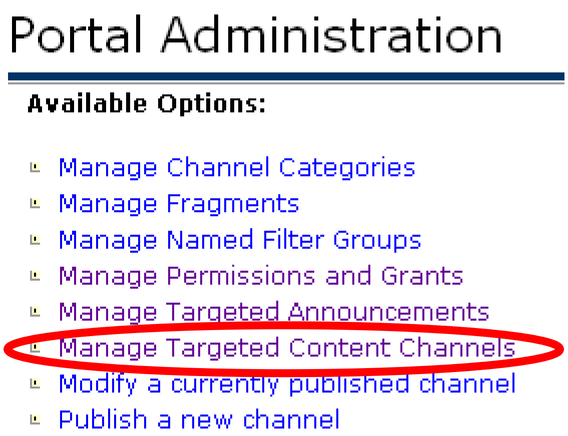
Steps

To define sections and include content:

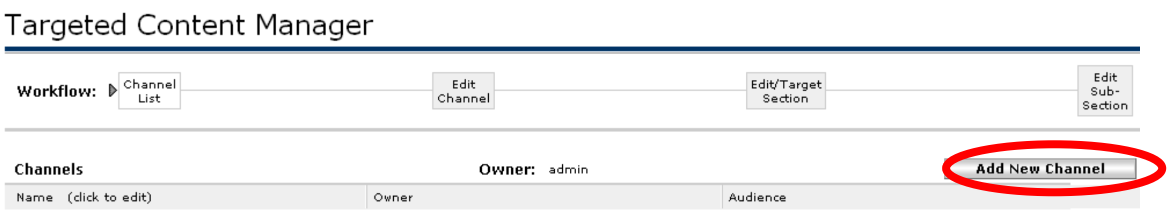
1. Click the **Portal Admin** link.



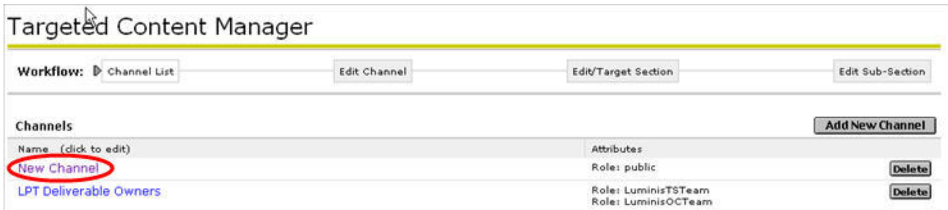
2. Click the **Manage Targeted Content Channels** link.



3. Select the **Add New Channel** button.



4. Select the **New Channel** link that now appears at the top left of the list of Channels.



Note**:** The list of channels under the Targeted Content Manager displays channels in **reverse chronological order**, thus the most recently created channel added is first, or at the top of the list.

5. In the Channel Attributes area, enter/select the following information

- Channel Name
- Channel Title
- Channel Category.

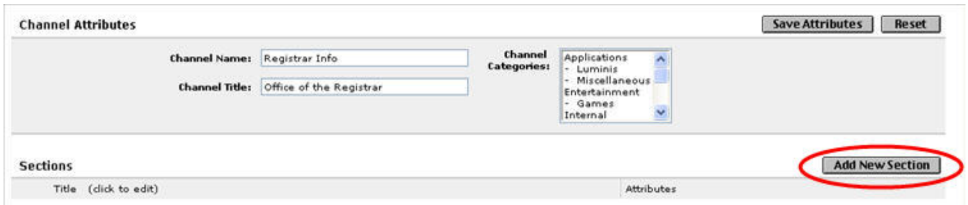
6. Select the **Save Attributes** button to save the Channel Attributes information.

Note**:** The **Channel Name** displays to Channel Administrators in the Targeted Content Manager's list of channels and in the list of channels available to end-users when they add channels to a tab.

7. The **Channel Title** is only displayed to end-users in the channel header at the top of the channel when viewing the channel in a portal tab.

8. In the list of Channels, you should find your channel with the new name (as entered in the previous step). Select your new channel name link.

9. Before adding content to your channel, you must define Sections. Select the **Add New Section** button below the **Channel Attributes** area.

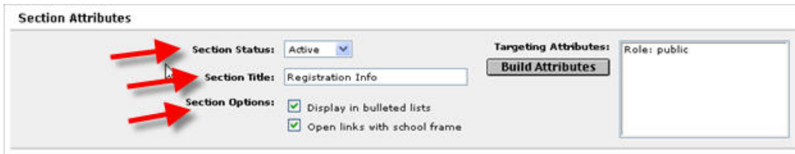


Note: The primary purpose of **Sections** in Targeted Content Channels is to assign the end-user **role(s)** that will be allowed to view the content in the channel's Sub-Sections.

10. You may setup one or more Sections as you desire within a Targeted Content Channel. Select the **New Section** link that appears in the list of Sections.

11. In the Section Attributes area, enter/select the following information

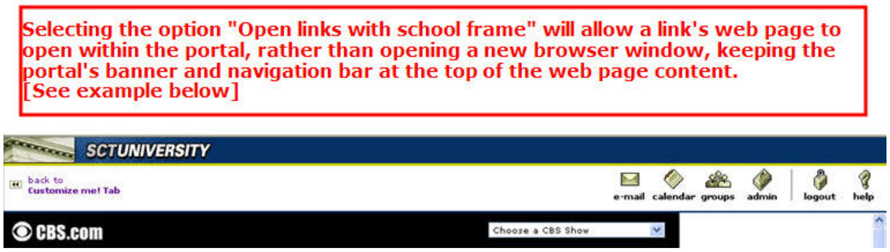
- Section Status
- Section Title
- Section Options.



Note: The **Section Status** must be set to **Active** for any of the Section's Sub-Section content to be viewable/accessible by end-users.

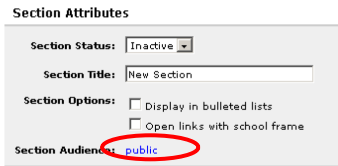
12. The **Section Title** is for channel organization only, and thus is not viewable to end-users.

13. The choices in **Section Options** are optional. Select **Display in bulleted lists** to have the content in the channel display as a list with bullets. Select "Open links with school frame" to have any links using the Link w/ Teaser subsection type in the channel open within the frame.

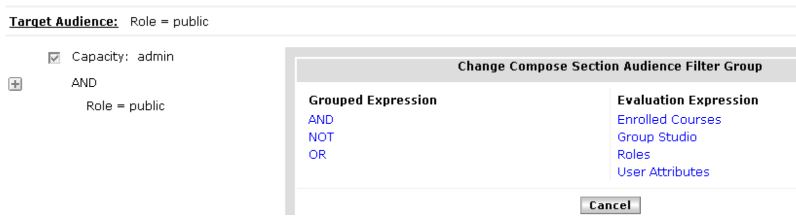


14. Scroll down to click the Save button to save your selections.

15. Select the **Section Audience** link.



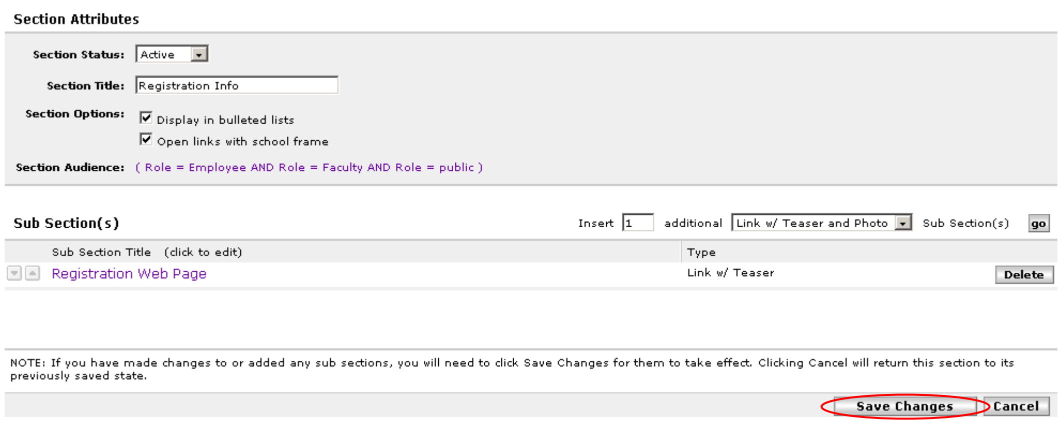
16. Select the target audience from the list of Available Attributes and click the **Done** button.



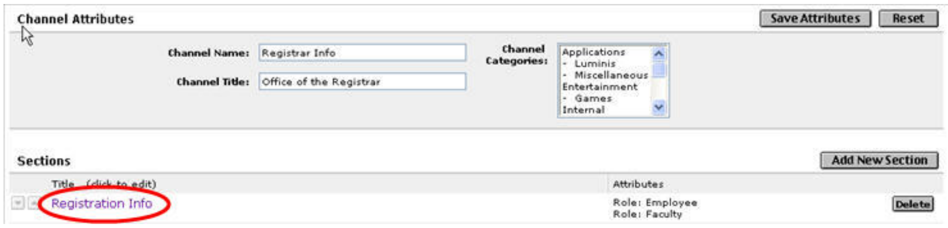
Note: The Section Audience **Filter Group** choice(s) you select identifies which End-Users will be able to view/access the Sub-Section channel content. This list of Roles is primarily determined by your student information system (e.g. Banner, Plus, PowerCAMPUS, etc.).

17. If no limitations have been set, the default choice for Role is **Public**, which selects all available Role choices automatically.

18. Select the **Save Changes** button to save the *Section Attributes* information.



19. Once your channel's Section information has been saved, content can be added to the channel through Sub-Sections. Select the **Section** link created in the previous step.



20. In the Sub-Sections area, enter the number of sub-section(s) you wish to create in the **Insert** field, then select the type of sub-section(s), and select the **Go** button.

Note: The primary purpose of **Sub-Sections** in Targeted Content Channels is to setup the **content** that End-Users will be able to view/access based on the Section's assigned role(s).

21. You may setup one or as many Sub-Sections as you desire within a Targeted Content Channel.

Follow the directions below that correspond to the type of Sub-Section(s) selected in the previous step. Subsection types include the following

- Link w/ Teaser and Photo
- Link w/ Photo
- File/Image Upload
- Free Form Text/HTML
- Remote HTML Reference
- Remote Image Reference.

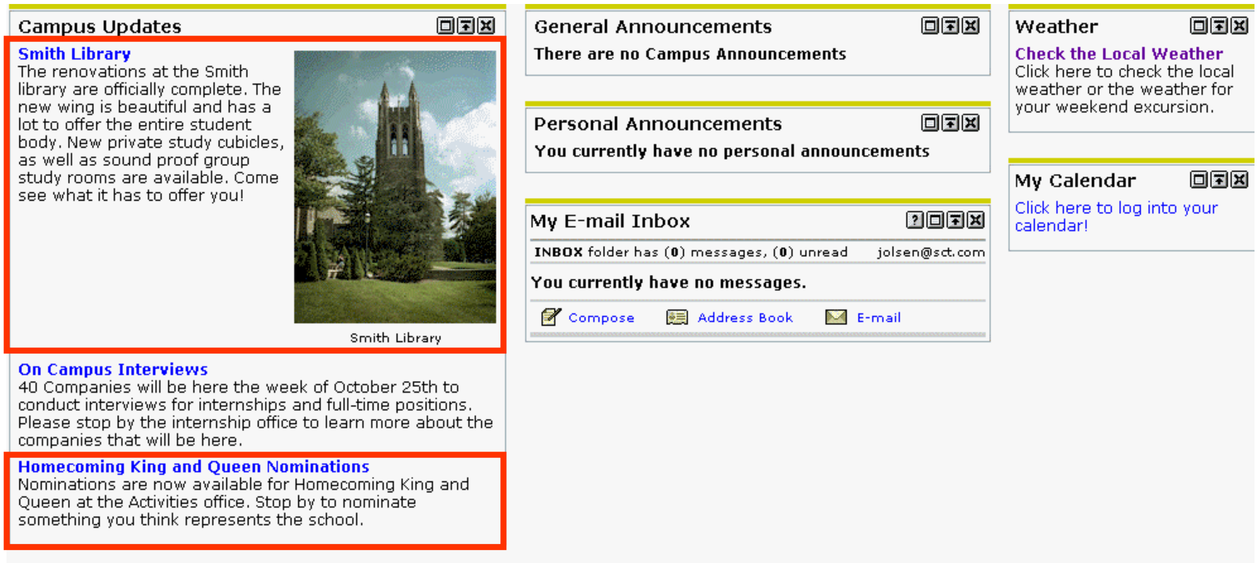
Exercise

Create a targeted content channel welcoming new students to the portal with links to the Academic Calendar, contact information for the Admissions office, and a link to the Registrar's Office

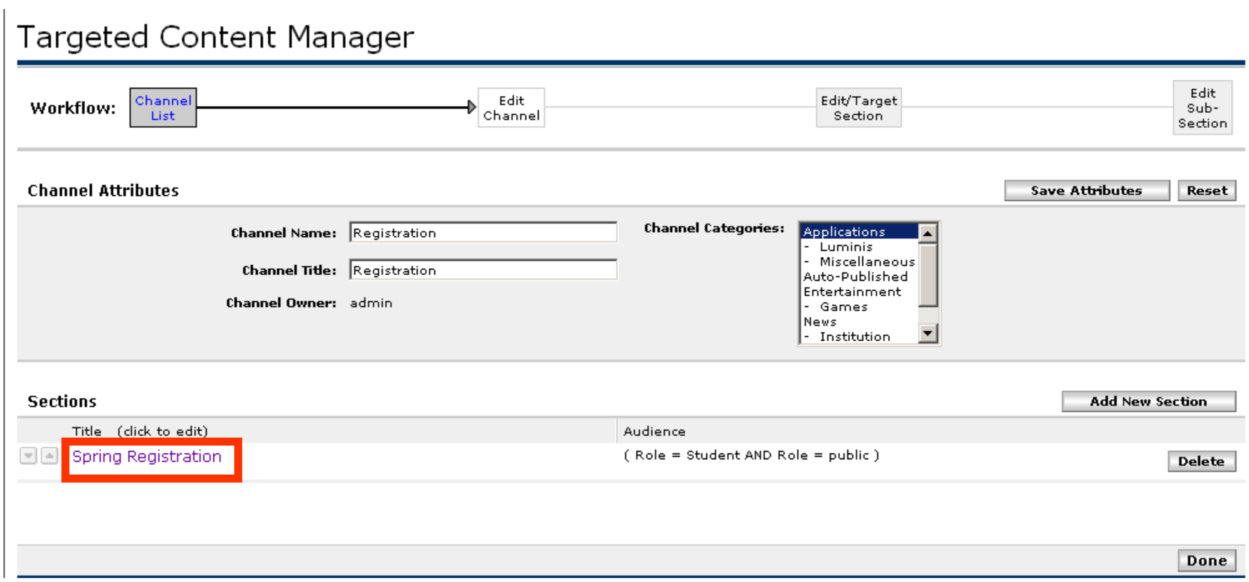
Defining Subsections

Sub-sections are where the content of your channel will reside.

Examples of subsections are highlighted.



After you have created a channel, the next step is to create sub-sections, which will house the content of the channel. To add sub-sections, utilize the Edit/Target Section screen.



Listed below are the options available to choose from the sub-section drop down list.

- **Link w/teaser and Photo**: Concert event link or notice of event with an image of the performers. The link would be to the full announcement.

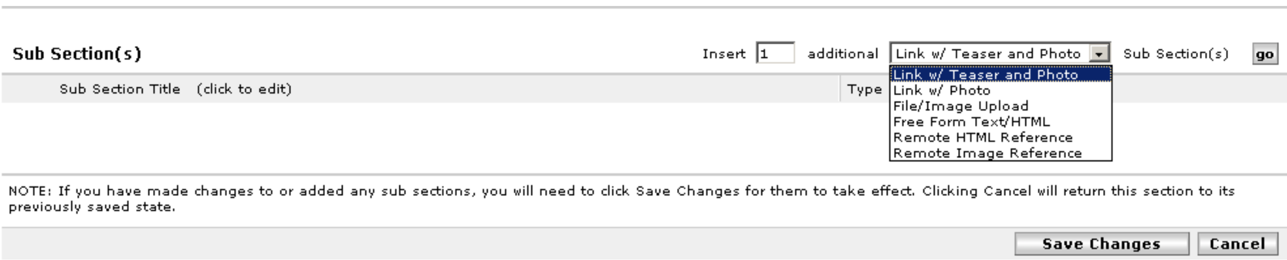
- **Link w/Photo**: Athletics page link with image of mascot.

- **File/Image Upload**: Image or HTML snippet from a hard drive.

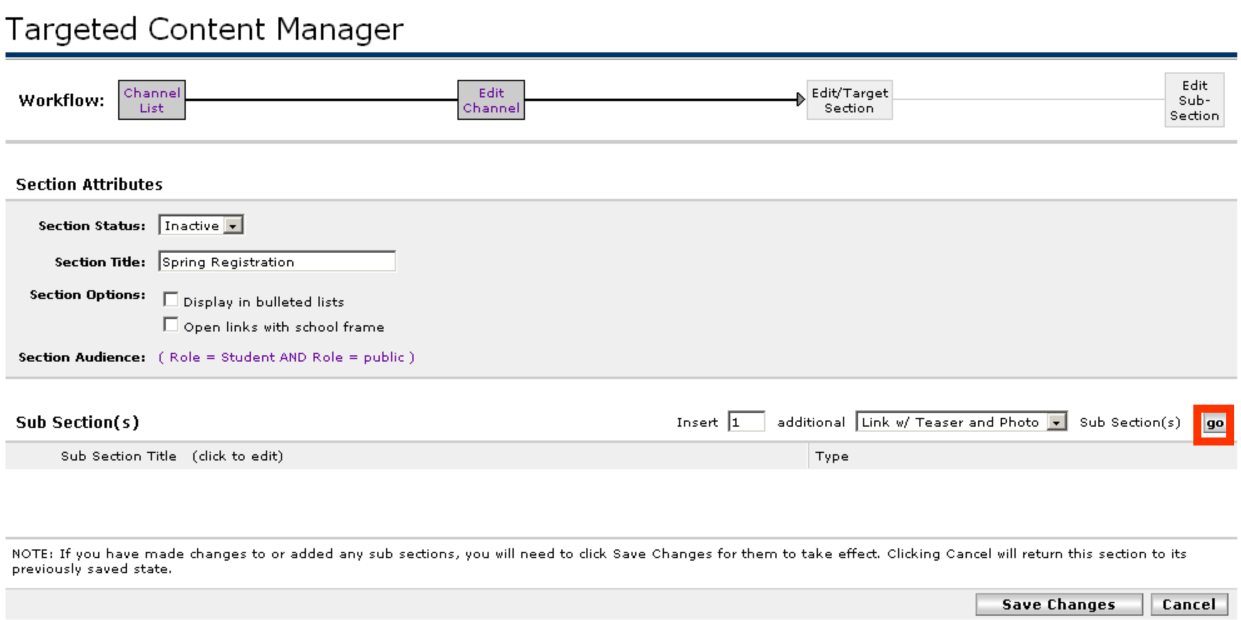
- **Free Form Text/HTML**: Cut and paste item from an e-mail submitted to the content administrator.

- **Remote HTML Reference**: Sports scores ticker.

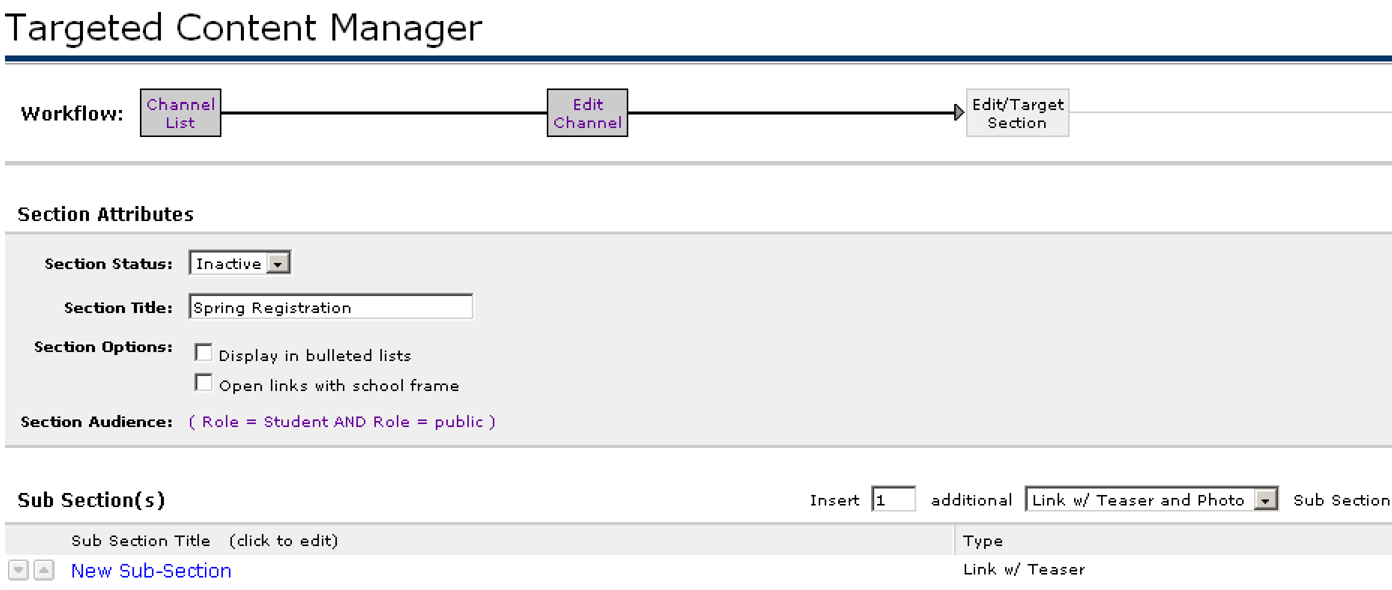
- **Remote Image Reference**: Web cam.



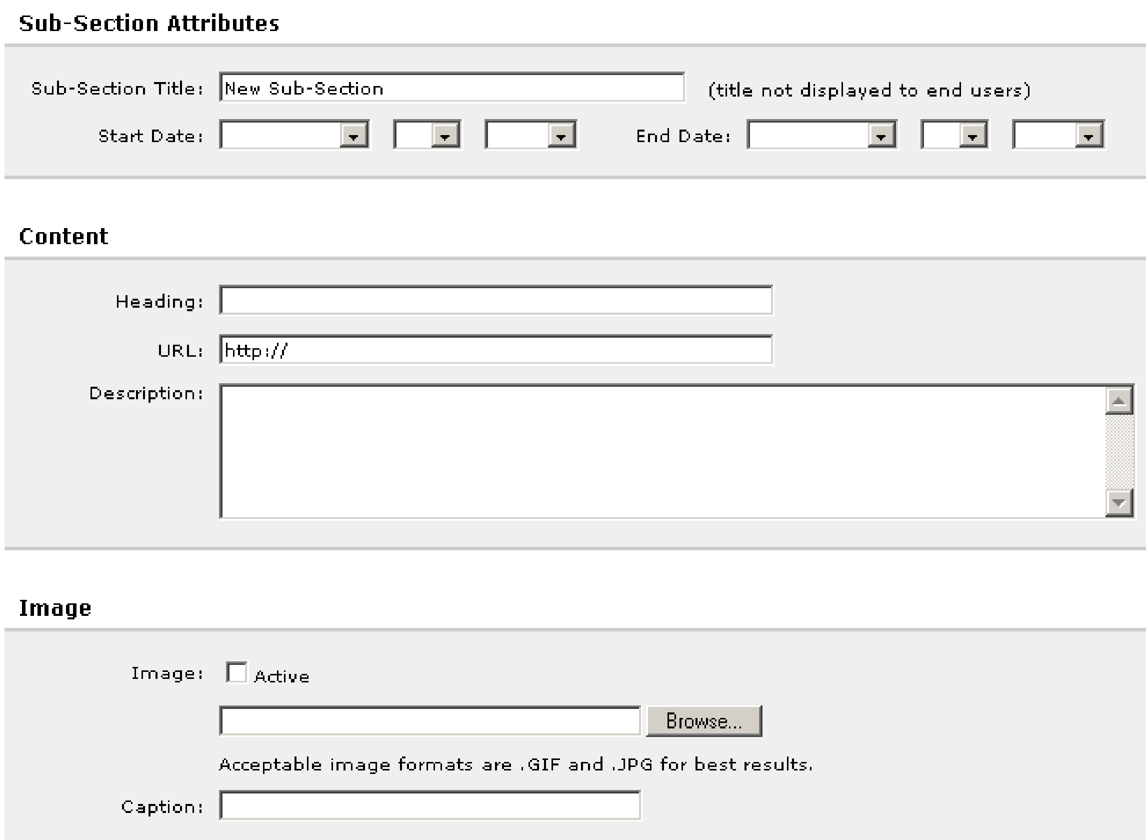
To add sub-sections, insert the number of sub-sections in the text box, then select the type of sub-section from the drop-down list. Then by clicking the **Go** button, you will be able to edit the sub-sections.



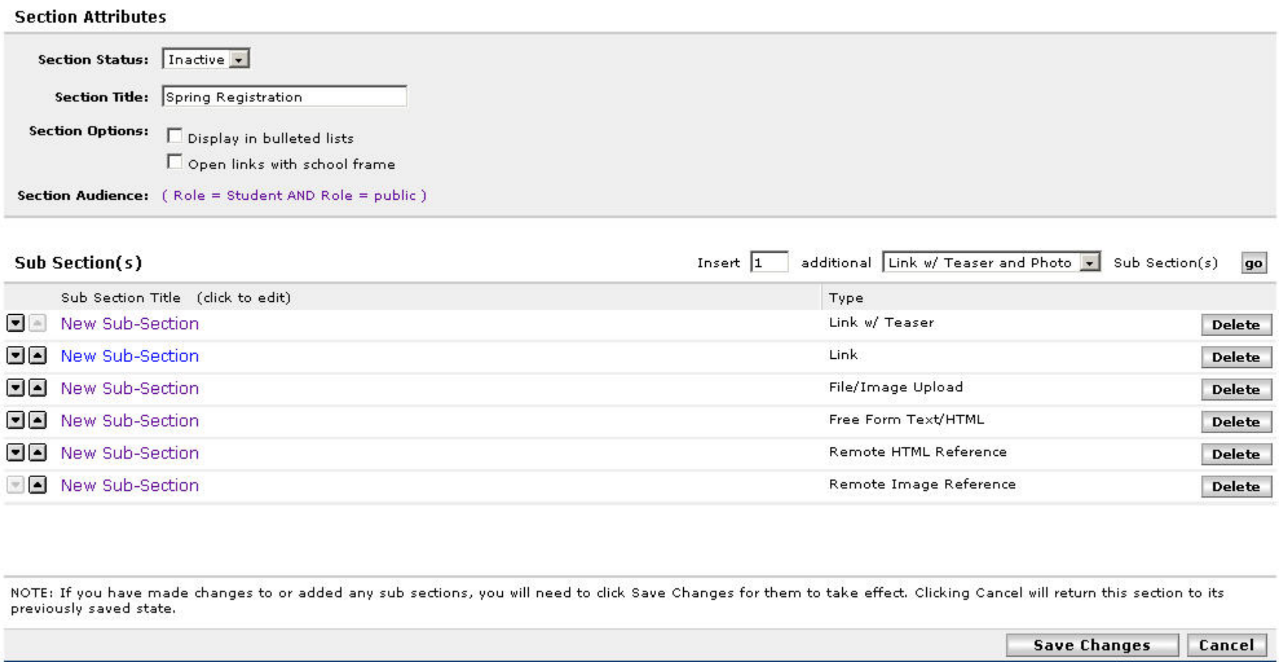
The system will automatically generate the number of sub-sections with their corresponding type. Clicking the **New Sub-Section** link will allow you to define the sub-section.



When you click the **New Sub-Section** link, the Edit Section screen appears. The Edit Sub-Section screen below details how to complete the a Link with Teaser and Photo sub-section.



When you have completed adding content to all sub-sections, click the **Save Changes** button to complete the work on this part of the channel. This will return you to the Edit Channel screen, where you will click **Done**. Once you click the **Done** button you will be taken back to the Channel List screen.



Exercise

Add content (in the form of a subsection message) to the channel welcoming new students to the portal.

Applying Accessibility Considerations

When creating portal channels, it is important to address accessibility concerns for individuals with disabilities. The guidelines provide basic but not exhaustive information concerning accessibility in portal content design. As you develop your portal's content, you should consult with your institution's disabilities services office or accessibility coordinator to ensure that you construct your channels according to current accessibility standards.

- **Images and animations**: Use the alt attribute to describe the function of each visual. (Use the Caption field where provided in Luminis to address this where available. Note that the **Image Upload** and **Remote Image Reference** have no ALT tags, so these subsection types may prevent compliance with the description requirement for images.

- **Multimedia:** Provide captioning and transcripts of audio and descriptions of video.

- **Hypertext links:** Use text that makes sense when read out of context. For example, avoid statements such as "To visit the Financial Aid Office, **click here.** Instead, construct the statement to read, "Visit the **Financial Aid Office**" so that the text over the link describes the location to which the link will take the user.

- **Page organization:** Use headings, lists, and consistent structure.

- **Spaces:** When you create an empty space after words or rows it pauses screen reader technologies, making the speaking voice much easier to follow.

- **Channel titles:** Avoid clever but vague names for channels. Instead, use meaningful names for channel titles, allowing users with screen readers to navigate to appropriate content by scanning through the channel titles on a tab until they find the relevant channel.

- **Channel length:** Avoid lengthy channels, as many screen reader technologies require reading of all channel content before moving to the next channel.

- **HTML channel content:** When using remote html, free form html, or html snippet uploads in the context of channels, make use of *summary attribute* (to describe channel content), *tooltip* (to describe the purpose), and *tab reading order* (to instruct the screen reader to read the channel title and then the channel content).

- **External content development tools:** Any content generated using tools outside of Luminis Platform should be evaluated by the institution to ensure its compliance with accessibility standards. Some technologies may present accessibility concerns for users of screen reader technologies, regardless of whether the content is viewed in the context of Luminis or independent of Luminis.

Self Check

Directions

Match the type of subsection with its application in the Luminis Platform.

Question 1

	TYPE	Answer	EXAMPLE
A	Link w/ Teaser and Photo		Image or HTML snippet from a hard drive.
B	Link w/ Photo		Cut and paste item from an e-mail submitted to the content administrator.
C	File/Image Upload		Concert event link or notice of event with an image of the performers. The link would be to the full announcement.
D	Free Form Text/HTML		Athletics page link with image of mascot.
E	Remote HTML Reference		Web cam.
F	Remote Image Reference		Sports scores ticker.

Answer Key

Question 1

	TYPE	Answer	EXAMPLE
A	Link w/ Teaser and Photo	**C**	Image or HTML snippet from a hard drive.
B	Link w/ Photo	**D**	Cut and paste item from an e-mail submitted to the content administrator.
C	File/Image Upload	**A**	Concert event link or notice of event with an image of the performers. The link would be to the full announcement.
D	Free Form Text/HTML	**B**	Athletics page link with image of mascot.
E	Remote HTML Reference	**F**	Web cam.
F	Remote Image Reference	**E**	Sports scores ticker.

Working with Published Channels

Section objectives

After completing this section you should be able to

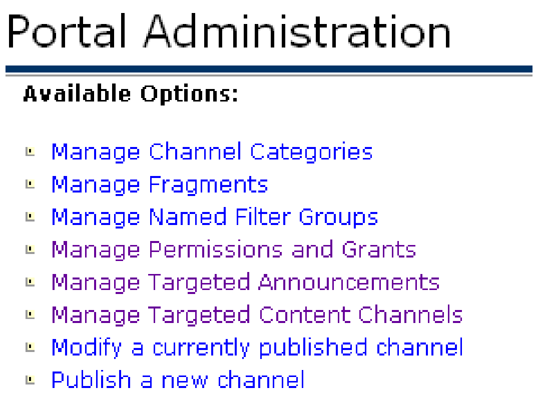
- describe channel types
- define channel parameters
- target an audience
- assign channel categories
- identify accessibility issues
- consider performance capabilities.

Scenario

You will create published channels at your institution so that you can distribute information to a specific audience in the campus community. You will setup the career services channel so that all students will see it in their layout.

Channel Types

In addition to the channels that are pre-published when the Luminis Platform is installed, you can publish any number of additional channels using the Channel Manager (Publish a new channel or Modify a currently published channel options) feature of the Portal Admin.



Channels fall into the following types:

Custom: Used for special channels with custom-written Java classes, typically application interfaces.

Applet: Used for displaying Java applets.

CPIP Inline Frame: Used for inline frame versions of CPIP-integrated systems.

CPIP Web Proxy: Used for incorporating dynamic HTML or XML application via CPIP Single Sign On.

Image: Used for presenting an image, with an optional caption and sub-caption.

Inline Frame: Used for presenting a channelized version of a webpage.

JSP Model II: Allows you to frame Java Server Pages using a controller class that handles business object interaction that is then delegated to JSPs to render the appropriate view.

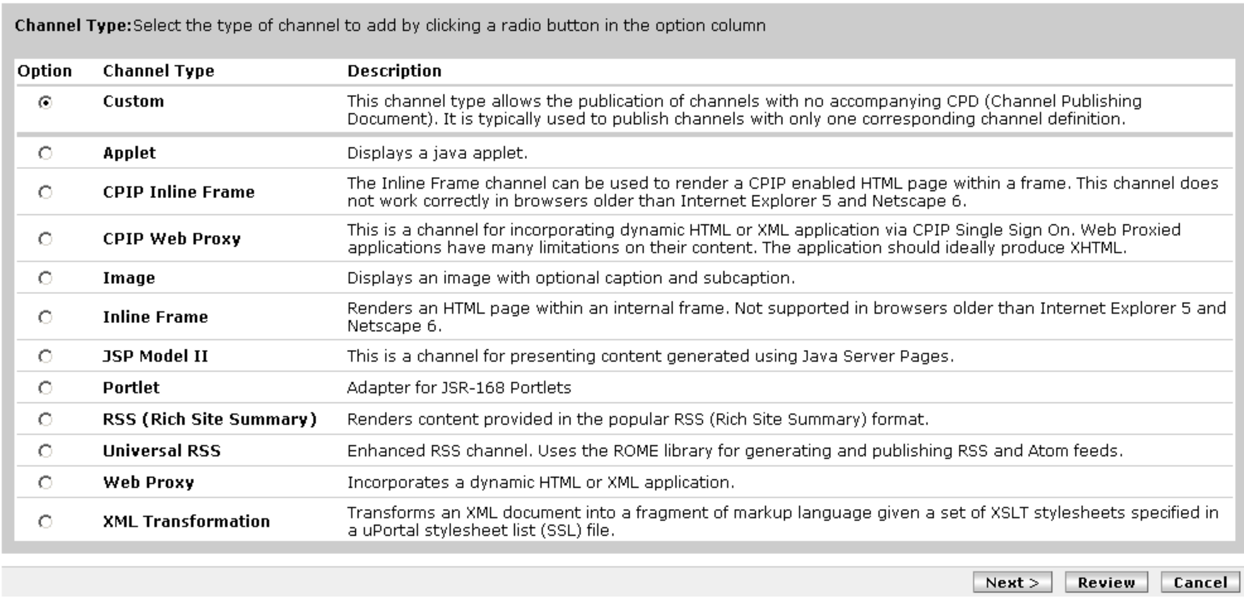
Portlet: Allows you to integrate a Web application into the Luminis Platform using the JSR-168 Portlet Specification.

RSS: Used for rendering a channel written in RSS format, typically a feed for news or feature articles.

Universal RSS: Enhanced RSS channel. Uses the ROME library for generating and publishing RSS and Atom feeds.

Web Proxy: Used for channelized versions of HTML or XML systems requiring web proxy services in the background.

XML Transformation: Used to render an XML file with an XSL stylesheet for presentation in channelized form.



Channel Type: Select the type of channel to add by clicking a radio button in the option column

Option	Channel Type	Description
◉	**Custom**	This channel type allows the publication of channels with no accompanying CPD (Channel Publishing Document). It is typically used to publish channels with only one corresponding channel definition.
○	**Applet**	Displays a java applet.
○	**CPIP Inline Frame**	The Inline Frame channel can be used to render a CPIP enabled HTML page within a frame. This channel does not work correctly in browsers older than Internet Explorer 5 and Netscape 6.
○	**CPIP Web Proxy**	This is a channel for incorporating dynamic HTML or XML application via CPIP Single Sign On. Web Proxied applications have many limitations on their content. The application should ideally produce XHTML.
○	**Image**	Displays an image with optional caption and subcaption.
○	**Inline Frame**	Renders an HTML page within an internal frame. Not supported in browsers older than Internet Explorer 5 and Netscape 6.
○	**JSP Model II**	This is a channel for presenting content generated using Java Server Pages.
○	**Portlet**	Adapter for JSR-168 Portlets
○	**RSS (Rich Site Summary)**	Renders content provided in the popular RSS (Rich Site Summary) format.
○	**Universal RSS**	Enhanced RSS channel. Uses the ROME library for generating and publishing RSS and Atom feeds.
○	**Web Proxy**	Incorporates a dynamic HTML or XML application.
○	**XML Transformation**	Transforms an XML document into a fragment of markup language given a set of XSLT stylesheets specified in a uPortal stylesheet list (SSL) file.

Next > | Review | Cancel

Defining Channel Parameters

Steps

To publish a Custom channel:

1. From the Portal Admin, click the **Publish a new channel** link.

Note: The channel publishing workflow will be displayed, with a screen for the first step (selecting a channel type).

2. Select the **Custom** radio button, then click **Next**.

Note: The General Settings screen will appear.

3. Enter the General Settings information into the following fields then click **Next**.

Channel Title: This value will appear as the channel title in the UI.

Channel Name: This value will appear in the drop-down box for channel selection.

Channel Functional Name: This value is used for JNDI lookup and Web service identification.

Channel Functional Name Accessible Only: This checkbox indicates whether or not a channel should appear in subscription lists or be accessible in focused mode only by a special URL.

Channel Description: This description appears in the channel manager (list of channels).

Channel Timeout: This value determines how long the channel has to be rendered into the UI before it times itself out. A typical value is **5000 msec** (5 seconds).

Channel Secure: This checkbox allows you to set whether the channel will be secured via secure socket layer (SSL) encryption. If you secure a channel under SSL, users will only be able to view it in a focused mode, meaning that they must maximize it using the appropriate channel control (provided in the channel) so that it occupies its own page.

Channel Class: This value is the java class information required for a Custom channel.

4. Enter channel parameters in the **Name** and **Value** fields and click **add**.

Note: Continue this process until all the parameters are entered.

5. Click the **Next** button after all parameters are entered.

6. Select the appropriate Channel Controls for the channel, then click **Next**.

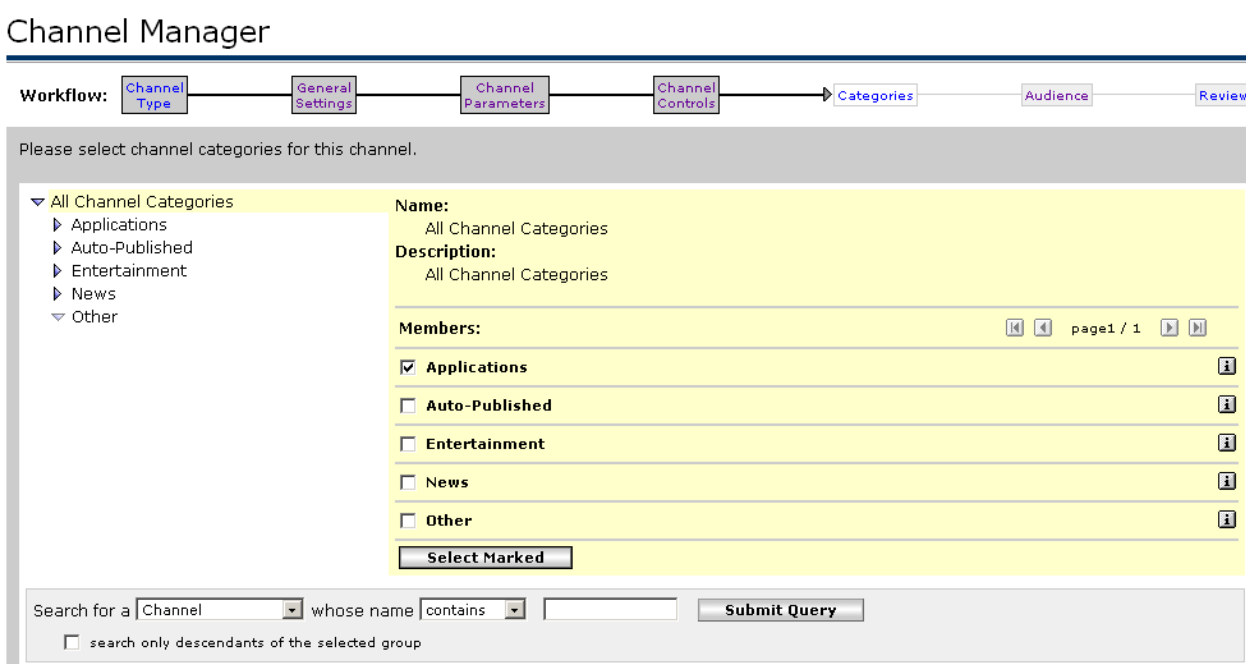
Editable: If selected, the Edit icon appears as a channel control. Users can use the edit control to modify channel preferences.

Has Help: If selected, the Help icon appears as a channel control. When clicked, help text specific to the channel replaces the channel content.

Has About: If selected, the About icon appears as a channel control. When clicked, information about the channel replaces the channel content.

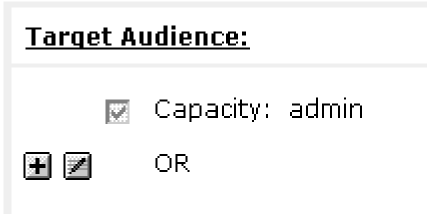
7. Select the Channel Categories to include and click the **Select Marked** button.

Note: Use the Search functionality to quickly search for a category.



8. Click the **Next** button.

9. Click the **Add** button to define the target audience(s) that can subscribe to this channel.



10. After the target audience is defined, click the **Next** button.

11. Check all the settings.

Note: If anything needs to be changed, you can click on the name of the setting or on the box in the workflow to be taken back to the appropriate screen. When you are finished making your change, click the **Review** button to be returned to the final review screen.

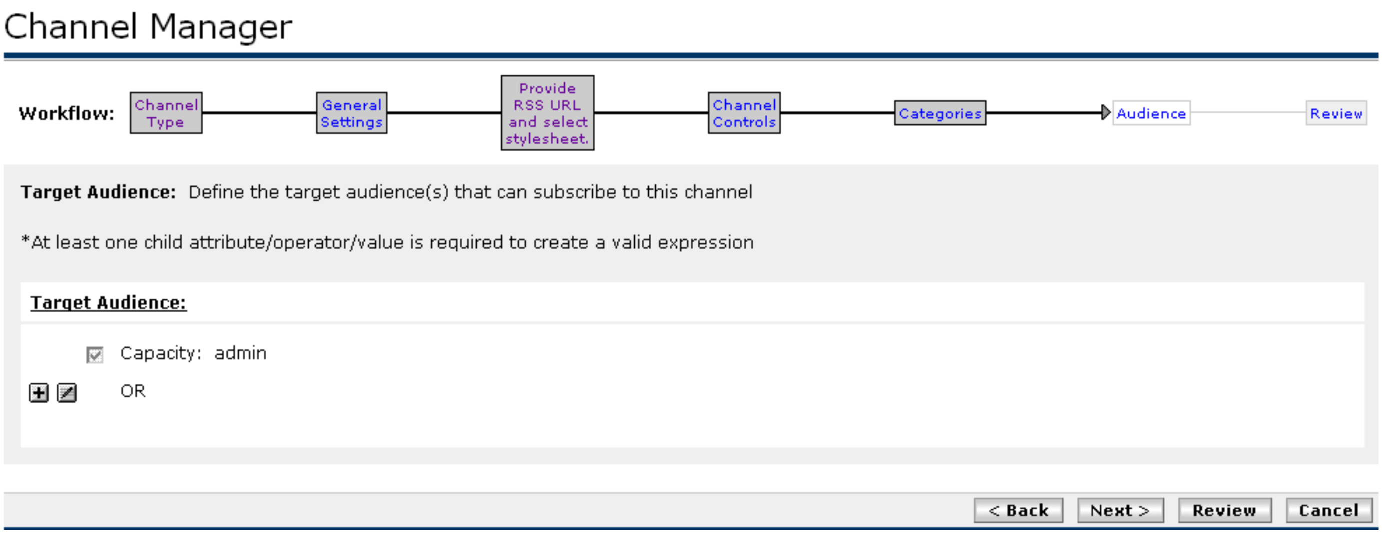
12. When you are satisfied with the settings, click the **Finished** button.

Setting Audience Targeting and Assigning Channel Categories

Setting Audience Targeting

The Audience screen allows you to refine the number of users that can subscribe to the channel and place it on their layouts.

You can opt to add conditions using the plus button ( )or edit existing conditions by clicking the **Edit ( )** button.



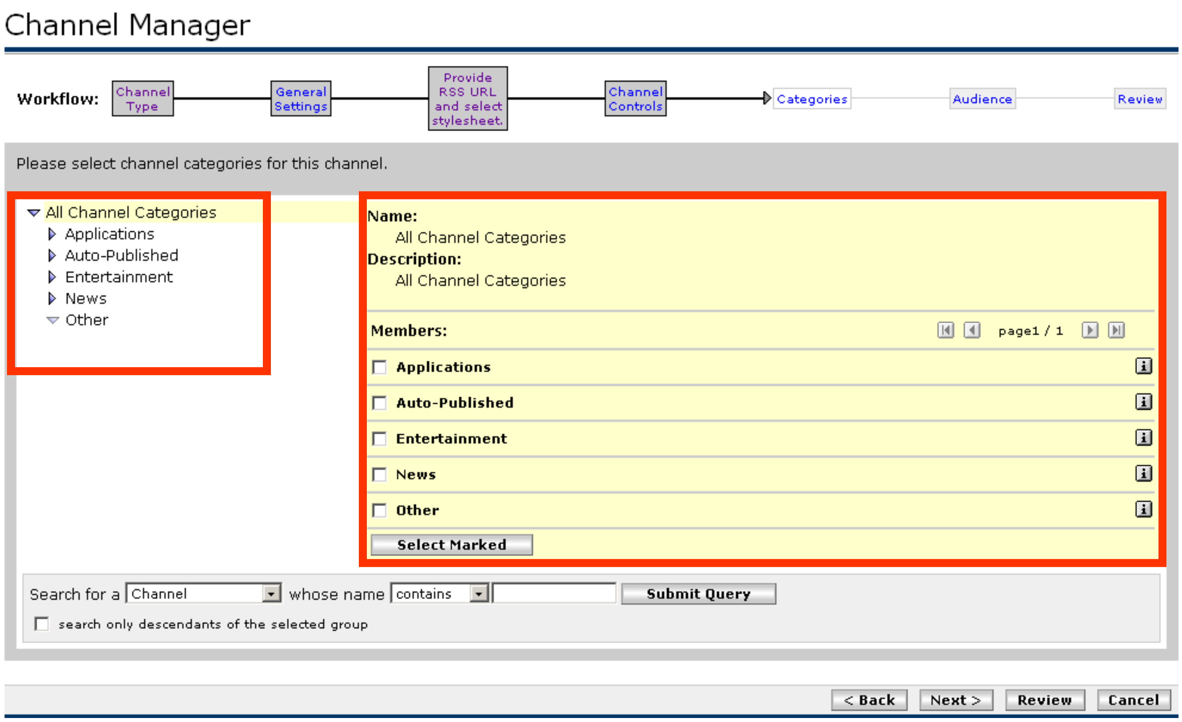
Refer to the *Defining Targeted Audience via Expression Editor* lesson fr more information on configuring an audience using the Expression Editor*.*

Assigning Channel Categories

The Categories screen allows you to define the categories under which the channel is organized.

Categories are used by channel subscribers to filter the pick lists from which they are selecting channels to add to their layouts.

Once the appropriate categories are selected, click the **Select Marked** button, then the **Next** button to move on to the next step.



Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

True or False: All channels in Luminis Platform are created in the GUI and do not require setup time.

Question 2

True or False: Channel categories are imported from a student information system and cannot be manually added to Luminis Platform.

Answer Key

Question 1

True or **False**: All channels in Luminis Platform are created in the GUI and do not require setup time.

Although some channels can be created entirely using the Workflow for Published Channels, several channel types require work outside of Luminis – such as the development of java classes - before publishing the channels.

Question 2

True or **False**: Channel categories are imported from a student information system and cannot be manually added to the Luminis Platform.

Channel categories can be added by clicking the ***Portal Admin*** *link, then clicking the* ***Manage Channel Categories*** *link.*

Creating and Managing Fragments

Section objectives

After completing this section you should be able to

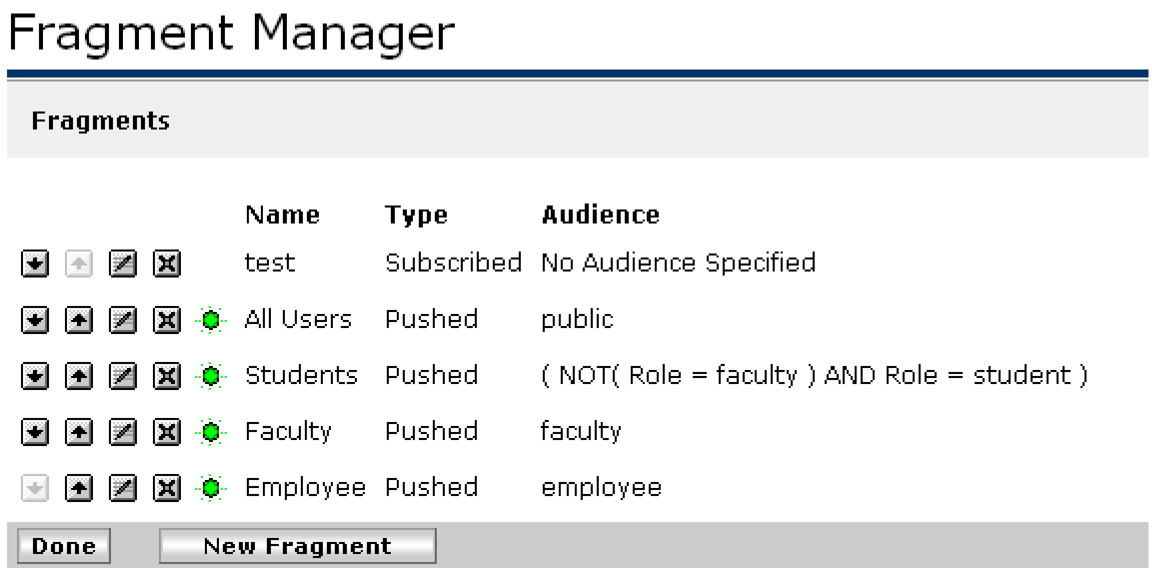
- describe the purpose of fragments
- create and target fragments
- set fragment precedence and status
- edit fragments with the layout owner account privileges.

Scenario

You will create fragments at your institution so that you can push layouts to students. You will set up a layout specific to students' needs with career services and networking channels. Then you will assign that fragment to users who have a role of student.

Purpose of Fragments

In Luminis Platform 4.1, layout fragments are created using an application called the Fragment Manager, illustrated below:



The Fragment Manager allows you to define layout fragments and their intended audience, to enable or disable layout fragments, and to adjust the fragment's priority to set their overall order of appearance. As a new feature of Luminis Platform 4.1, layout fragments can now be published for subscription.

Creating and Targeting Fragments

Steps

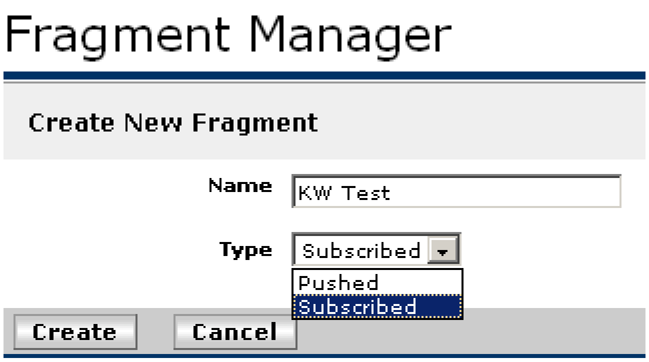
To add a new fragment:

1. Click the **Portal Admin** link.
2. Select the link **Manage Fragments**.
3. Click the **New Fragment** button.
4. Enter the fragment **Name** and **Type**.

   Valid Types are:

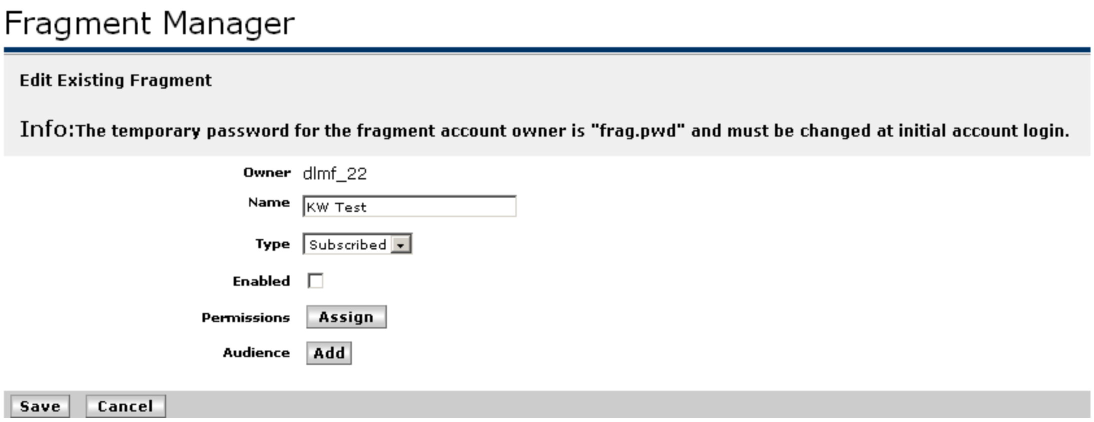
Subscribed fragments are available for users who are members of the target audience, who can add the fragment voluntarily to their layouts. Users can access this channel to subscribe to fragments by clicking the Content/Layout link then selecting the Add Fragment button.

Pushed fragments automatically adds the elements that it defines to the overall layouts of members of the target audience.

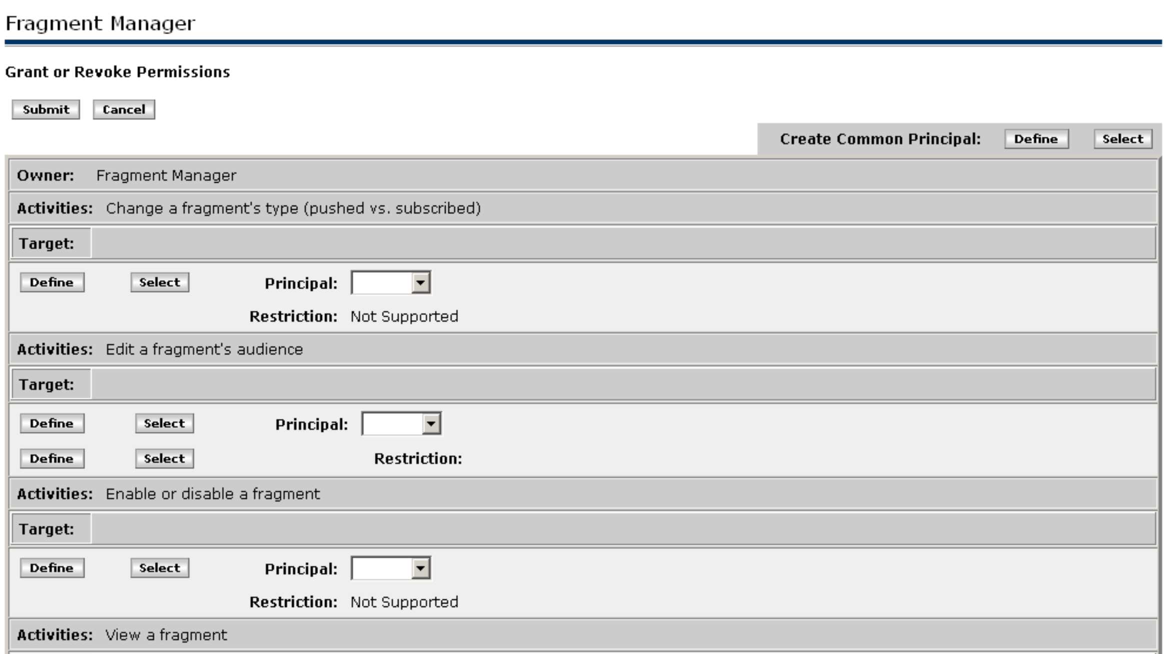


5. Click the **Create** button.

6. Click **Enabled** to enable to fragment.

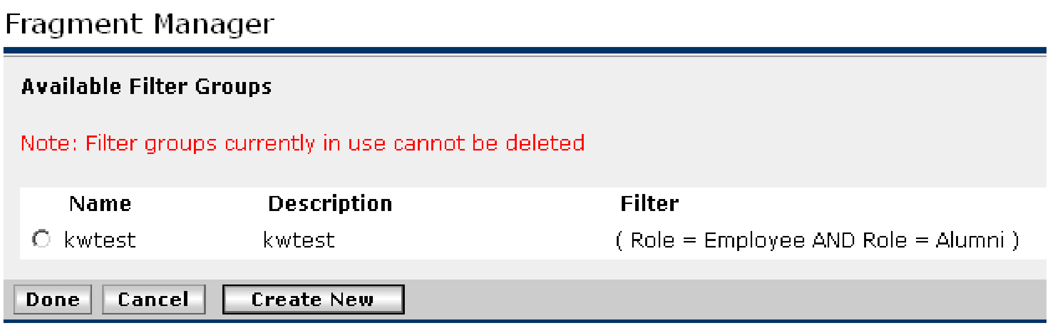


7. Click the **Assign** button to assign permissions to the fragment. Click the **Define** button to define the target audience for the filter.



8. From the options in the top right corner for creating a Common Principal, click **Define** to define a target audience or **Select** to apply a new or existing filter.

Note: A Common Principal is a target audience that you want to be able to grant permission to for one or more of the available activities.



9. Click the **Submit** button after all Permissions have been entered.

Exercise

Create a pushed fragment called Student – MY INITIALS. Just create the "shell" of the fragment in this exercise – we will add content to the fragment in a later lesson.

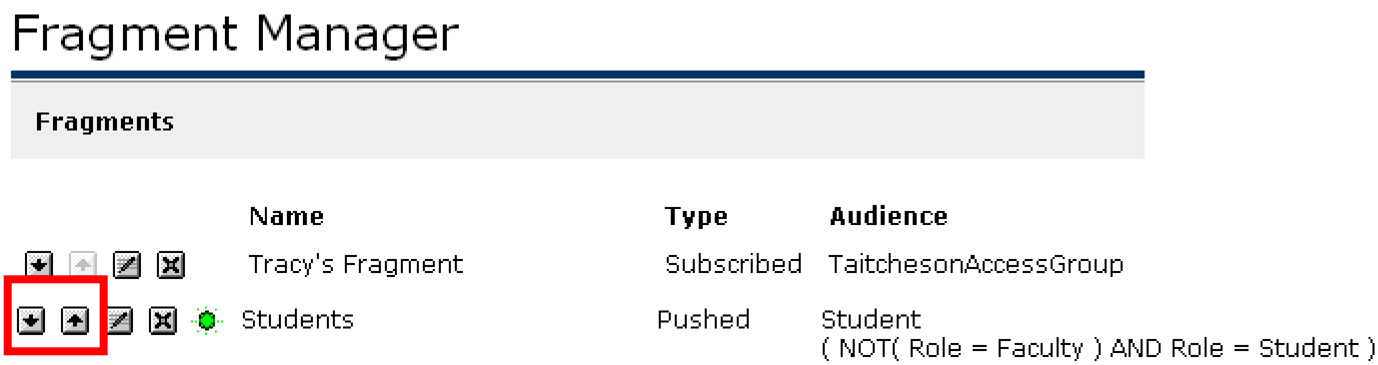
Add to the fragment Student – MY INITIALS to the Career Center and Networking channels. The audience for the pushed fragments is Students.

Setting Fragment Precedence and Status

To set the fragment precedence and status, click the **Portal Admin** link, then click the **Manage Fragments** link.

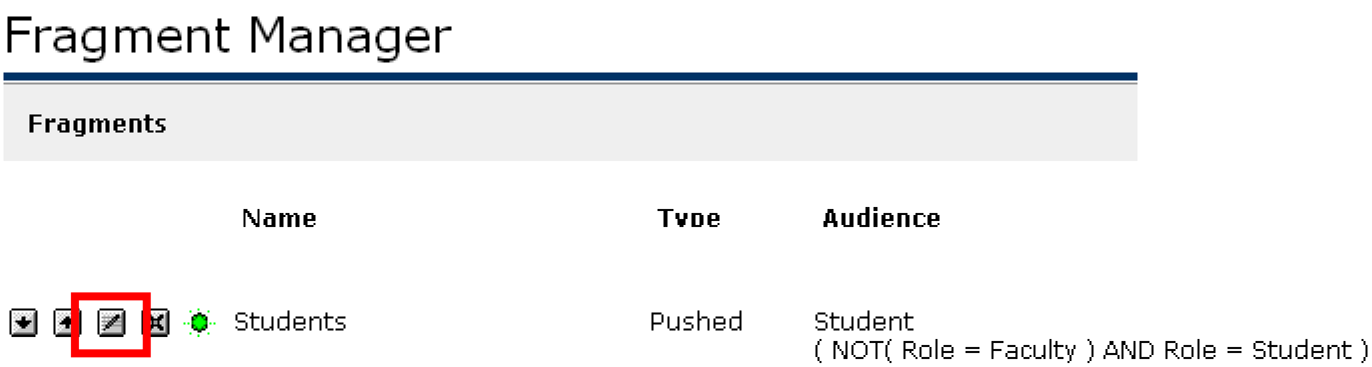
Set fragment precedence

Use the arrow keys to set the precedence of fragments.

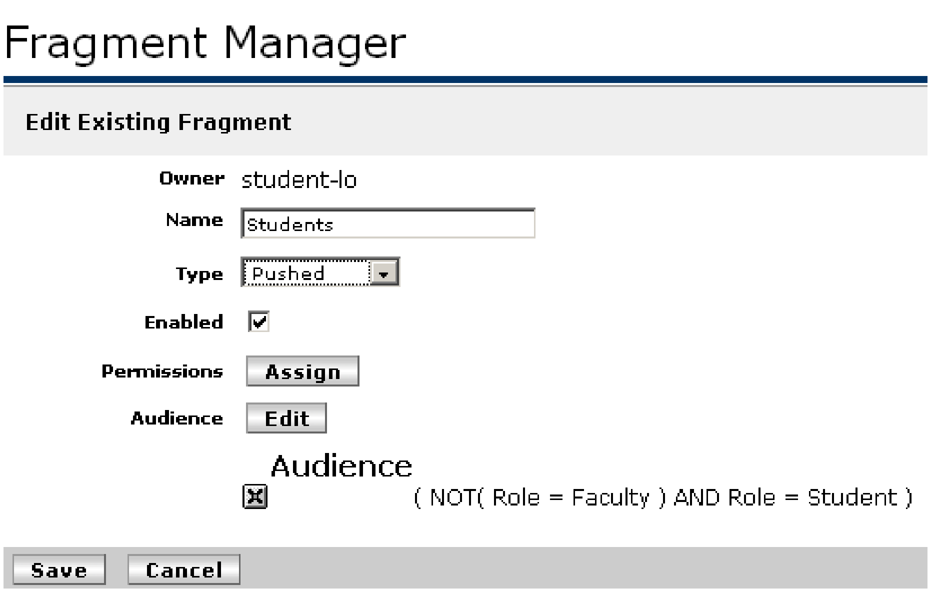


Set fragment status

Click the **Edit** button to set fragment status.



You can set up the fragment Type as either **Subscribed** or **Pushed** and **Enable** or **Disable** the fragment from this screen.

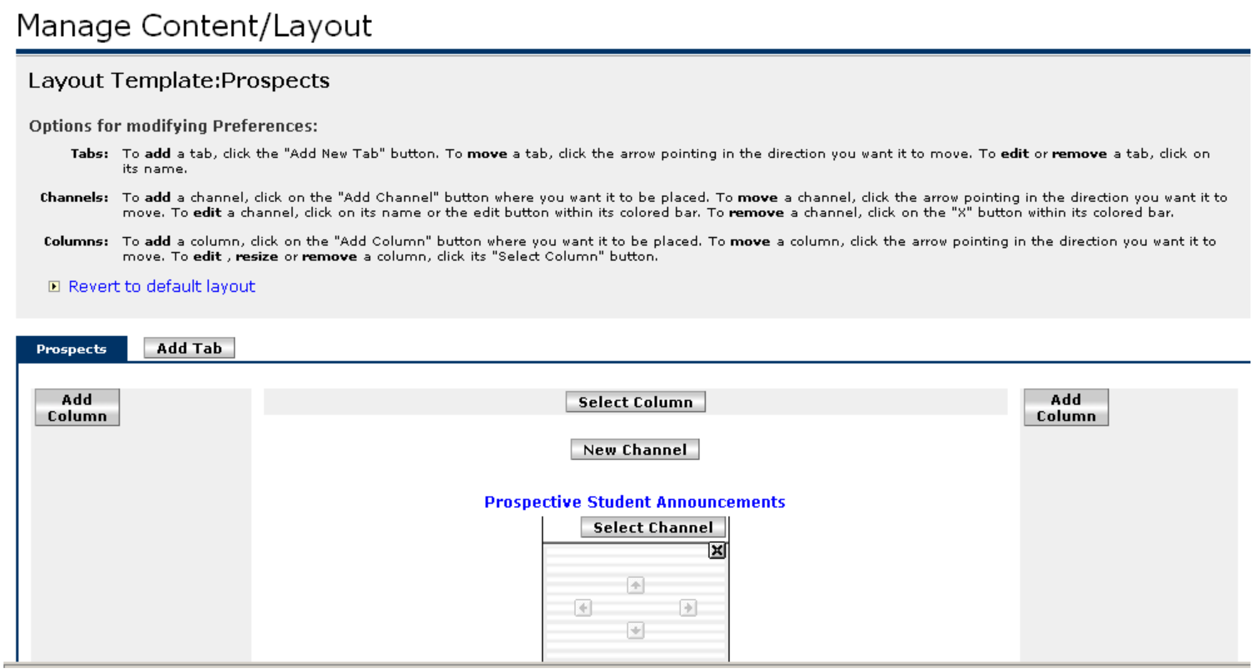


Editing Fragments via Layout Owners

The Fragment Manager allows layout owners to lock channels, columns and tabs in to position for users with specific roles.

After a fragment has been created, the Fragment Manager will assign a fragment owner username and a temporary password that the layout owner can use to log in with. The fragment user name uses a format similar to the following, where the number is unique to each fragment: dlmf_24.

Note: The temporary password that is assigned to each fragment owner is *frag.pwd*, which must be changed upon initial log in.



Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

Name the two types of fragments.

___

Question 2

Which of the following are permissions a fragment owner can delegate:

a. View a fragment

b. Change a fragment's type

c. Enable or disable a fragment

d. Edit a fragment's audience

e. All of the above

Answer Key

Question 1

Name the two types of fragments.

Subscribed and **Pushed**.

Question 2

Which of the following are permissions a fragment owner can delegate:

a. View a fragment

b. Change a fragment's type

c. Enable or disable a fragment

d. Edit a fragment's audience

e. All of the above

Creating and Using Filter Groups

Section objectives

After completing this section you should be able to

- describe the uses of filter groups
- create a filter group
- edit a filter groups
- delete a filter group.

Scenario

You will set up filter groups at your institution so that you don't have to create complex expressions every time you are going to assign a group of users to a feature in the Luminis Platform. You will create a group called Content Managers, who have the role of Content Manager or Administrator.

Uses of Filter Groups

Filter Groups are groups of users that meet a set of criteria that you define using attributes such as enrollment in a course, membership in a Group Studio group, roles, majors, home institution, date of birth, and the like.

Where are filter groups created?

In the Portal Administration Center.

Where can filter groups be *used*?

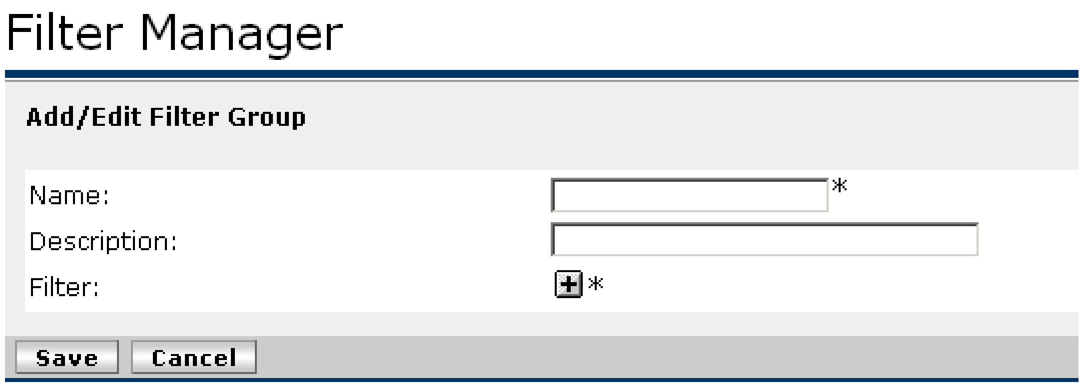
- to target skins and content managed through the System Administration Center
- when delegating permissions to system applications and activities through the Permissions Manager
- to layouts through the Fragment Manager.

Creating Filter Groups

Steps

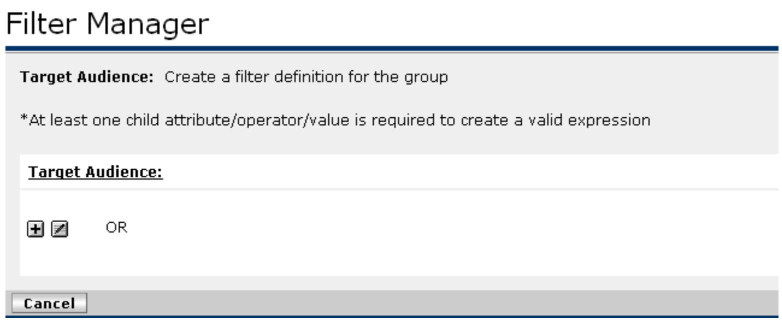
To create a filter group:

1. Click the **Portal Admin** link.
2. Click the **Manage Named Filter Groups** link.
3. Click the **Create New** button.
4. Enter the filter group **Name** and **Description**.

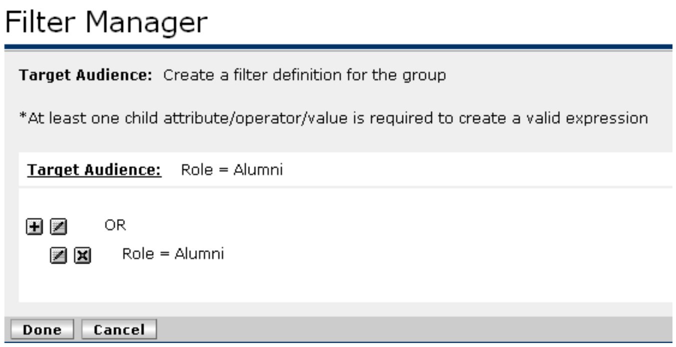


5. Click the **add** expression button (indicated by a plus sign) to add a filter.

Enter the target audience following steps outlined in the *Defining Targeted Audience via Expression Editor* lesson.



6. Click the **Done** button.



7. Click the **Save** button.

Exercise

- Create a filter group of Students who are Biology or Chemistry majors.

- Add to the fragment Student – MY INITIALS the Career Center and Networking channels. The audience for the pushed fragments is Students.

Editing and Deleting Filter Groups

To edit or delete a filter group, you must be in the Filter Manager section of the Portal Administration Center.

Steps

To edit or delete a filter group:

1. Click the **Portal Admin** link.
2. Click the **Manage Named Filter Groups** link.
3. To delete an existing filter group, click the **delete** icon (X) next to its name.
4. To modify an existing filter group, click the **edit** icon (pencil) next to its name.
5. When you are finished modifying the group's Name, Description, or Filter, click **Save.**

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

True or False: Filter groups are reusable Boolean expressions.

Question 2

True or False: Filter groups are a combination of users, groups, and permissions.

Answer Key

Question 1

True or False: Filter groups are reusable Boolean expressions.

Question 2

True or False: Filter groups are a combination of users, groups, and permissions.

Managing Color and Logo Sets

Section objectives

After completing this section you should be able to

- target skins at groups of users
- update colors and logos in the layout
- set the precedence by which skins are applied for users.

Scenario

You will configure skins at your institution so that you can insert your institution's colors in the layout scheme. You will also add your institution's branding to layouts by inserting the intuitional logo to the layout. If a user is assigned to multiple roles, s/he will receive the skin with the highest precedence. For example, if the user has Student and Employee roles, but the Employee skin has a higher precedence than the skin targeted to the Student role, the user would receive the Employee skin.

Targeting Skins

The Luminis™ Platform ships with two skins: the classic skin, which is the default, and an XP style skin. The Luminis Platform also incorporates the ability to change the look and feel of the interface displayed to the user by allowing you to create new skins. Functionality that was associated with color and logo sets in the Luminis Platform III will be handled in the Skinning feature in Luminis Platform 4.1.

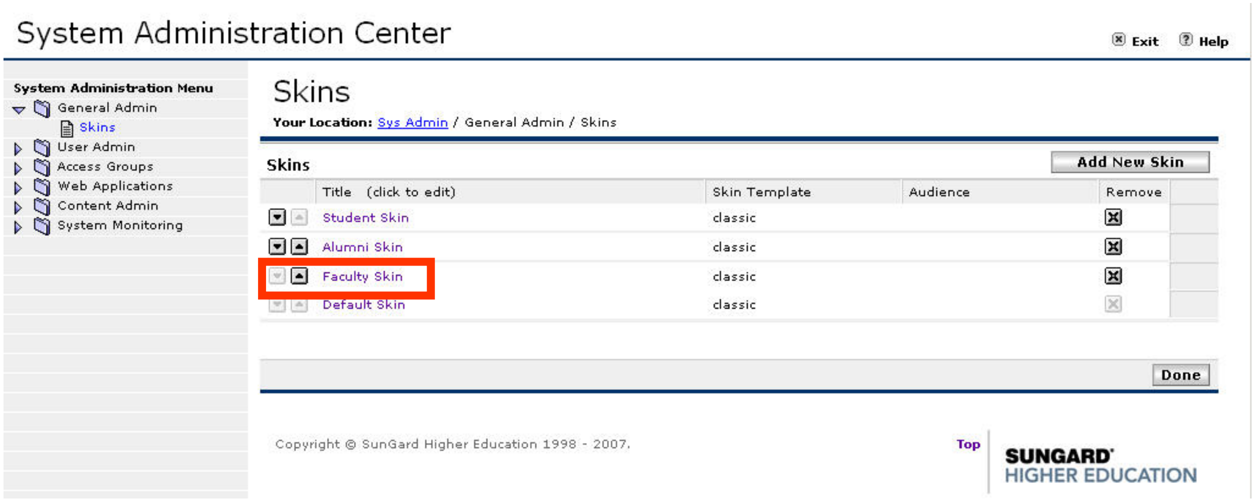
Institutions can create and deploy their own skins that can be used as global defaults or that can be assigned by the administrator to groups of users based on attributes like role, major, home institution, membership in a Group Studio group, etc. Information on developing custom skins for Luminis Platform is available through the Luminis Platform 4.1 User Interface SDK – User Interface Customization Guide, available through the SunGard Higher Education Customer Support Center. Custom skins allow the institution to define the design components of channels and tabs, among other visual elements in the portal user interface.

After a filter group is added in the Portal Administration Center, the filtering functionality in the Skins section of the System Administration Center will be offered.

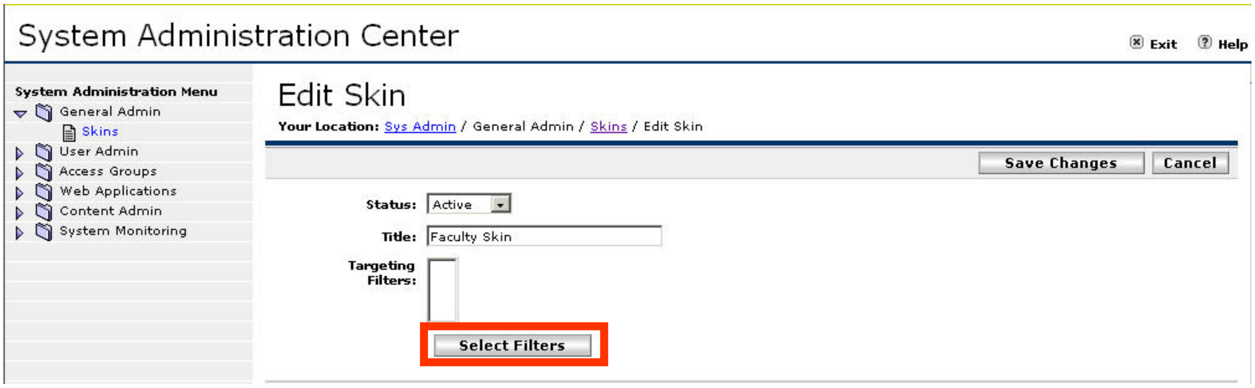
Steps

To assign a filter to a skin:

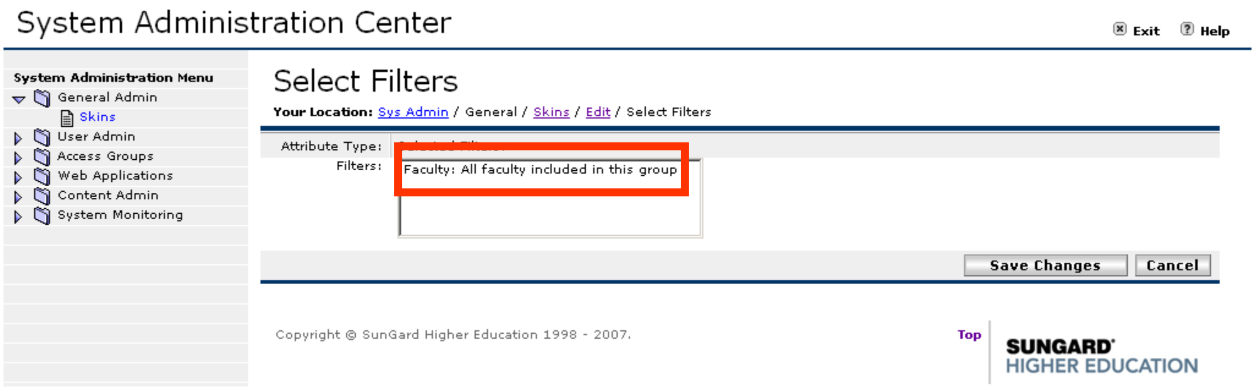
1. Click the **Skin** link to apply the new Filter Group to the skin.



2. Click the **Select Filters** button to assign the Filter Group to the skin.



3. The Description entered when the Faculty Filter Group was created is referenced in the Select Filters screen. Click the filter group you want to apply. Then click the **Save Changes** button.



Updating Colors & Logos

Create skins by clicking the **Add New Skin** button from the System Administration center. After that button is clicked several skin features can be customized to meet your needs.

Steps

To create a new skin:

1. Click the **Admin** icon from the tool bar.
2. Click the **General Admin** option.
3. Click the **Skins** link.
4. Click the **Add New Skin** button.
5. Click the title of the skin, *new skin* and enter skin parameters.

Modifying Colors

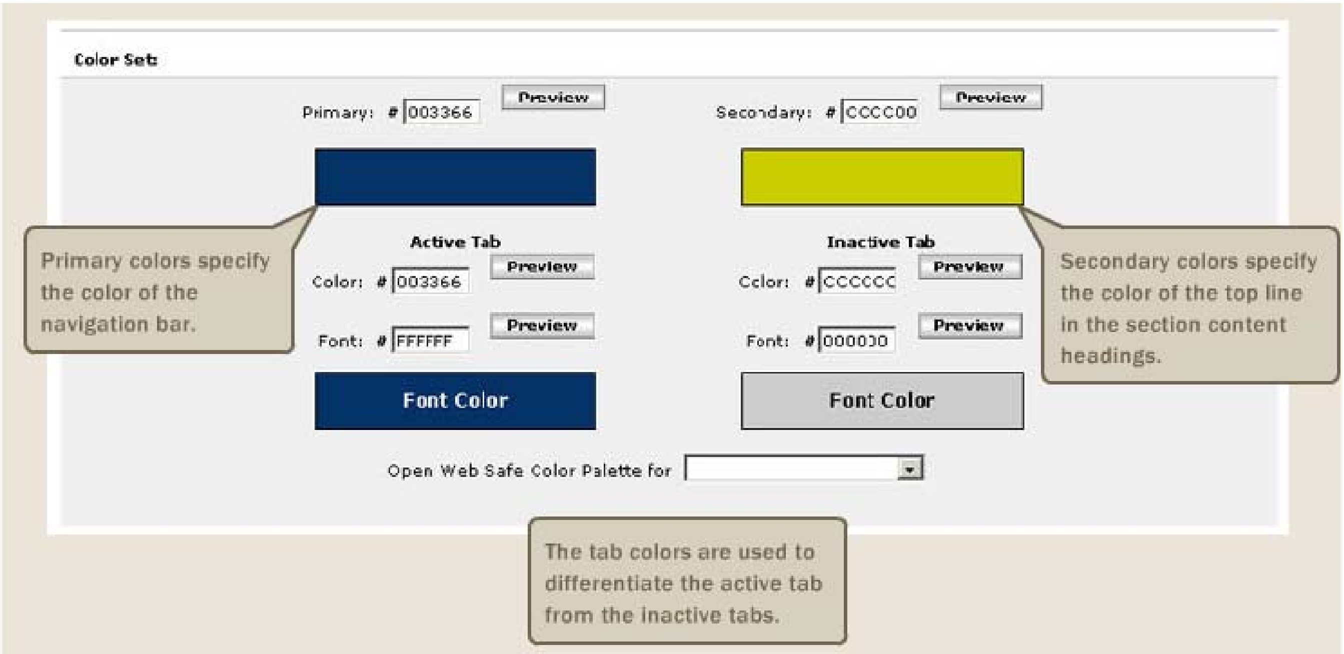
In the Color Set section, choose a set of primary and secondary colors for the active and inactive tabs and their fonts.

The tab colors are used to differentiate the active tab from the inactive tabs. To set and preview the colors, do the following:

Enter hexadecimal color values in the fields provided.

Press the **Preview** button to see what the colors will look like.

Note: If you do not want to work directly with hexadecimal values you can specify the colors by using the drop-down menu to select a color palette. A pop-up window will appear. After clicking a color, click the **Close** button.

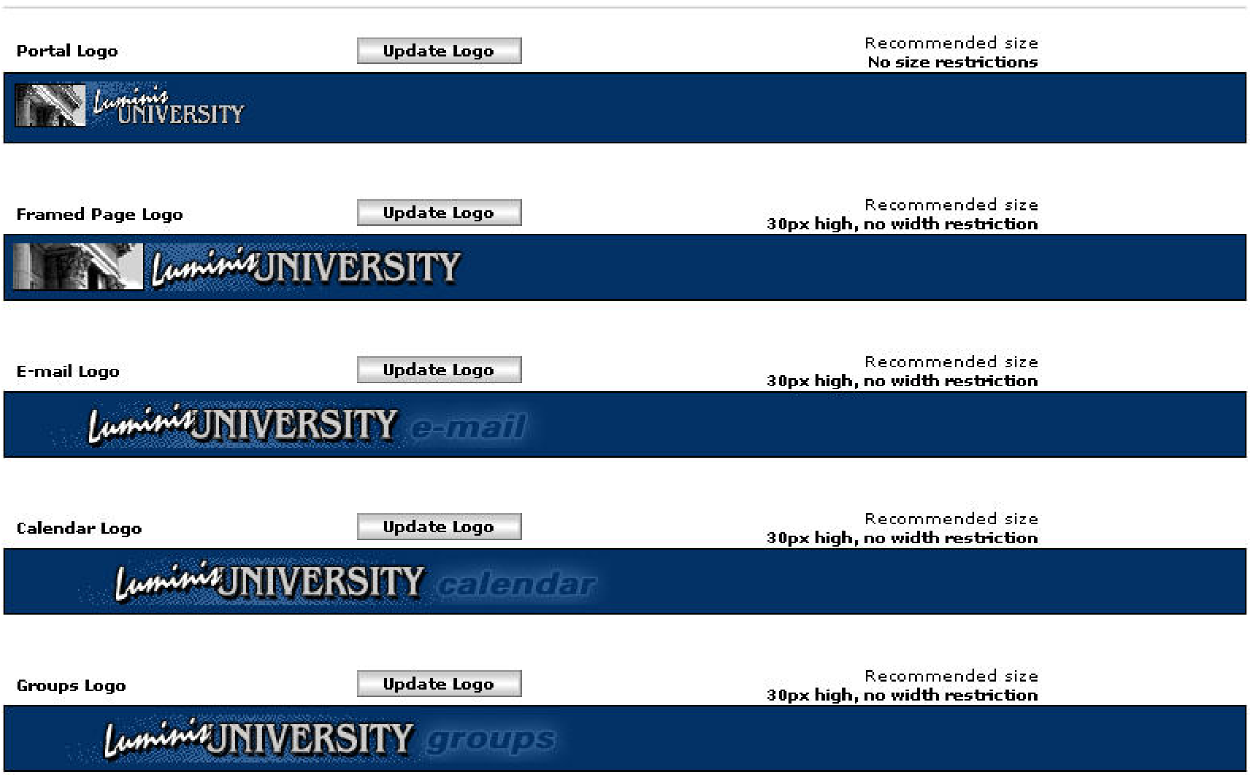


Modifying logos

In the Logo section, select a logo that will be located in the left-hand corner of the navigation bar. To update the logo, click the **Update Logo** button.

For the Portal Logo, all logos must be in **.HTML**, **.HTM**, **.TXT**, **.GIF**, or **.JPG** formats. If the file type used is HTML, all code in file must be "well formed" by XML standards.

All other logos must be in .gif or .jpg file type and must be 30 pixels high.

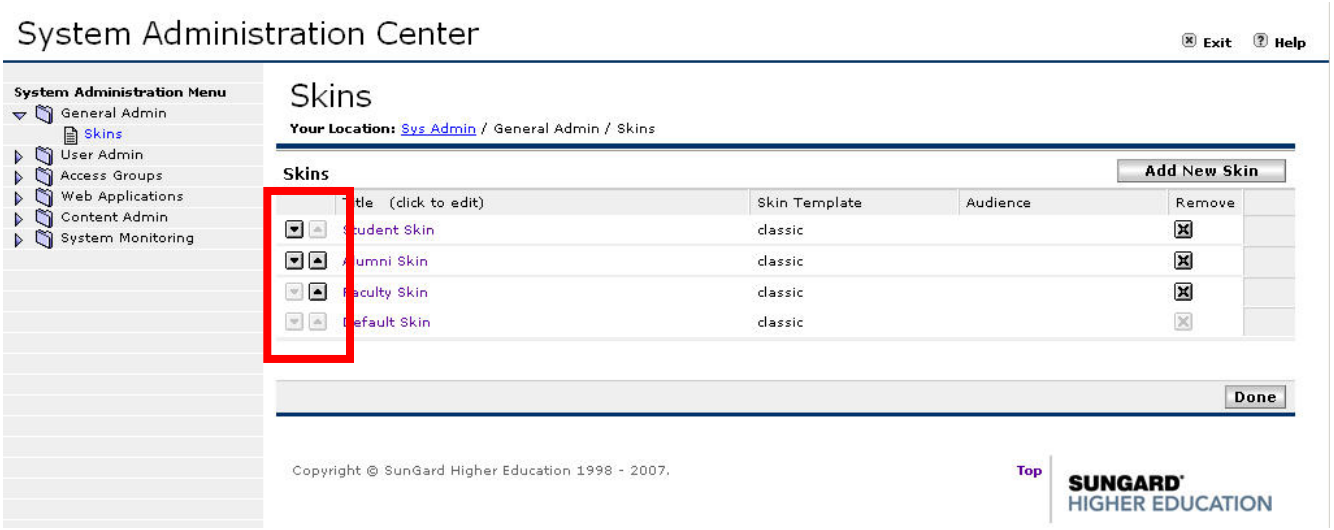


Exercise

Create a new skin called Faculty. Insert your school colors in the skin and add your school logo as the Portal Logo.

Setting Skin Precedence

To prioritize skins, click the corresponding arrows to move a skin up or down in the list. Prioritizing skins comes into play when a user has more than one role. The skin highest up on the list will be rendered first to a user with multiple roles.



Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

True or False: Skins are created in the Portal Administration Center.

Question 2

Name the two delivered skin templates that can be utilized.

____

Answer Key

Question 1

True or **False**: Skins are created in the Portal Administration Center.

*Skins are created in the System Administration Center – create skins by clicking the **Admin** icon from the layout.*

Question 2

Name the two delivered skin templates that can be utilized.

***Classic** and **XP** styles.*

Joining, Requesting, and Participating in Groups

The **Groups** application provides the ability to create and manage group homepages for clubs or other affiliations and interests. To solicit membership, each group will have two homepages: a guest view and a member view. The guest view provides general information about the group and an option for non-members to join. The member view provides the ability to

- read articles that have been posted by the group and submit articles for posting
- access links to other Internet resources that the group deems appropriate and submit potential links
- view photos posted by the group and submit photos for posting
- view information about and e-mail other group members
- post files that can be shared with other group members
- access a group chat room, message board, and an online calendar
- post your own personal homepage link for group members to access.

The Groups application is accessed by clicking the Groups icon located in the toolbar.

If you have Groups administrator privileges, when you access the Groups application you see three tabs: My Groups, Group Index, and Create Group.

The **My Groups** tab provides access to group links to which the user is subscribed, to overall policies about forming and belonging to groups at your institution, and to a form that will allow you to **request creation of a new group**.

The **Groups Index** tab provides a listing of all categories of groups at your institution and access to the individual group homepages within each category so that you can read about and request to **join the group**.

The **Create Group** tab provides the form necessary to create a new group. If you create a new group, you become the group leader and have initial responsibility for creating and managing the group homepage and guest view.

Groups fall into four categories: **Public, Restricted, Hidden and Admin Blocked**. Public Groups have no membership criteria and are available for immediate access to group homepage content. Restricted groups are subject to certain membership criteria and require approval from the respective Group's leadership to join the Group. As you work with the Groups index, you will see the following icons that indicate the type of group (a green icon indicates a Public Group and a yellow icon indicates a Restricted Group):

Key = Public Group   Restricted Group

Hidden Groups are not accessible via the Groups Index and can only be accessed by the Group leader adding a user as a member of the group. Membership for Admin Blocked Groups works the same as Hidden Groups; additionally Groups administrators cannot access Admin Blocked groups or the content posted in such groups.

Types of users for the Groups application:

Group Administrators: Responsible for approving groups and assigning group privileges, creating the policies that support the Groups software, and creating and managing the categories that organize groups within the application.

Group Leaders: Responsible for creating, approving and maintaining the content of the group homepages and guest views, and for managing member profiles to delegate responsibilities or inactivate and delete members.

Delegated Group Content Manager/Group Leader: Responsible for managing specific group content or overall group leadership, as assigned through Delegated Permissions by the Group Leader or Group Administrator.

Group Members: Join groups in which they are interested, participating in message boards and chat rooms, and submitting content that they want to see posted on the Group homepage.

Guests: System users who have not joined a group but wish to access a guest view for information or to join a group.

Joining a Group

Steps

To join a group and access the group's member page:

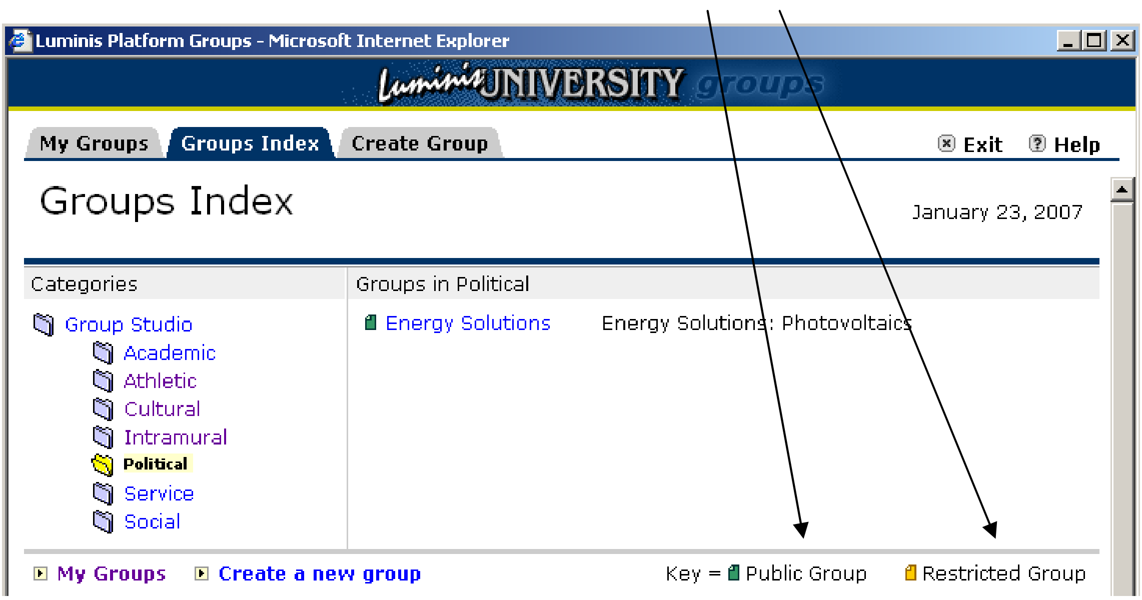
1. If you have not already done so, click the Groups icon. 

2. Locate and click the Group Index link, or click the **Groups Index** tab.

3. From the Category Index, click a category that contains the group you want to join.

4. For example, if you were interested in joining the ski club, you might find it within a category such as "Recreation and Sports."

5. Each group is flagged by one of the following key icons indicating whether it is public or restricted:



Note: You are in the group's guest view.

6. To join the group, click the **Join** icon.

Note: You see the Membership Request window. If the Group is a public group, you will see its Membership Policy. If the group is restricted, you will also see additional membership criteria, and a section that you use to explain why you want to join the group.

7. For membership in a *public* group, read the membership policy, click the checkbox indicating you have read and understood the policy, and then click the **Join** button.

8. For membership in a *restricted group*, make sure you meet the additional membership criteria, read the membership policy, type in the reasons you want to join the group, click the checkbox indicating you have read and understood the policies, and click the **Join** button.

Note: You will see an indication that your membership request has been submitted. Once accepted, the group will appear under your My Groups index and you will be able to access its member page.

Exercise

Join one of the available groups in the portal. What Category was it in?

Group Tools

Acceptance to a public group is immediate. Acceptance to restricted groups depends on review by the respective group's leader, and thus may take time for validation. Once you have access to the member view, you may have some or all of the following tools at your disposal:

Announcements allow the group's leader to send brief announcements to group members. These announcements appear both on the group's homepage and in the users' Personal Announcements channel.

Calendar allows you to access a calendar dedicated to your group. This function is available only at institutions that have licensed Luminis Platform at the enterprise level.

Chat allows you to enter the group's dedicated chat room where you can participate in real time online discussions with other members.

E-mail allows you to send e-mail messages to group members.

Files allows you to download files that have been posted by the group leader or other members and submit files for potential sharing with other members of the group, upon review and approval by a designated group member or leader.

Links allows you to view all of the links that have been posted by the group and to submit links for potential posting, subject to approval by the group leader.

Members allows you to view a list of other group members and information about each, including any homepages that the member might have posted. You also have the ability to post your own homepage link.

Message Board allows you to enter the group's dedicated message board where you can read and post messages and replies for topics of interest.

News allows you to read all articles that have been written by other members and posted by the group, and to submit articles for potential posting subject to approval by the group leader.

Photos allows you to view all of the photos that have been posted by the group and to submit photos for potential posting subject to approval by the group leader.

Note: In some instances, you may be asked by the group leader to manage certain components of the member homepage or guest view. If so, the group leader will delegate permissions and you may have access to one or more of the Group Leader Content and/or Configuration Tools.

Requesting a Group

Before you create of a group, you must determine whether it will be a Public group or a Restricted group and verify your institution's policies that must be followed for creating and administering your group's homepages. Once you have done this, use the following procedure. (Note: End users will see a Request Group tab; they will follow the steps outlined below but their request must be reviewed and approved by the institution's Groups Administrator.)

Steps

To request the creation of a group:

1. Click the **Create Group** tab or link.

You see the Create a New Group window, which contains the following fields:

- **Group Status:** Active or inactive.
- **Group Name:** The name of the group as it will appear in the group index.
- **Group Title:** A short description of the group. This description will appear next to the group name in any group index lists.
- **Guest Page Description:** A more detailed description of the group, which may include things like a purpose or mission statement. This description is initially posted to the group's guest view page, where it can be modified at any time by the group leader. Notice that the description supports HTML formatting.
- **Group Category:** The category to which the group is assigned.
- **Groups Policy:** The policies set forth by your institution for which online groups must abide. You must read these policies and check the box indicating that you understand the policies to complete the request submission process.
- **Group Type:** The type of group, either Public or Restricted. Public Groups have no membership criteria and are available for immediate access to the group homepage content. Restricted groups are subject to certain membership criteria and require approval from the Group leadership to join the Group. If you are requesting creation of a Restricted group, you will also need to fill in the field titled "Criteria for restricted access." You can also specify if you want this group to be **Hidden**, which means that it will not be listed in the Group Index (so users cannot find it by browsing; users become members of Hidden groups by being added to the group by the respective group leader or a group administrator), or **Admin blocked** (which means that group administrators

will not be able to view the group homepage or content posted there).

- **Browse control:** You may select a subset of users (by role) who will be able to see the group listed in the Group Index. If you make no selection, the group will be visible to all portal users.

- **Sorting:** Sort membership lists by last name; otherwise it will default to first name sorting.

- **Group Applications:** These check boxes allow you to request the features and tools that should be provided to the group through the homepage. Note that there is also a checkbox to request that management of the selected features can be delegated. Unless you plan to maintain the group homepage entirely yourself, you should check this option.

- **Creation Comment:** Any other information that the school should know as it evaluates whether to accept the request and create the group.

2. Fill in the fields contained in the form as appropriate to your group.

3. Read the Groups Policy and check the box indicating that you understand your school's Group policies.

4. To submit the request, click the **Create Group** button.

5. To exit without creating a group, click **Cancel**.

Note: If you opted to create the group, you will see a window stating that your request has been submitted.

6. Click **OK**.

Note: You are returned to the My Groups page.

Exercise

Create a new group for Biology and Chemistry majors and put it in the Academic category. Specify the group as a restricted group. (This will be relevant for a subsequent exercise.)

Content Tools

The following tools that the Group Leader will see depend on the rights and permissions granted by the System Administrator:

Manage Homepage allows you to edit the initial content that members see on the homepage, including featured photo, and featured links.

Manage Guest View allows you to edit the content that non-members see on the group's guest page, including the group description, a group photo, general group links, and other group information.

Manage News allows you to edit articles that have been submitted for posting and to post article to and delete articles from the group homepage.

Manage Photos allows you to post photos to and delete photos from the group.

Manage Links allows you to post links to and delete links from the group homepage.

Manage Files allows you to post and order files for downloading by group members.

Manage Message Boards allows you to create descriptions for the group's message board forum and to delete message board topics and replies.

Manage Calendar allows you to add events and other important items to a group calendar.

Manage Announcements allows you to send, edit, or re-send brief announcements to group members. These announcements will display on the respective Group homepage and in the Group member’s Personal Announcements channel.

Group Leader Activity Channel

In Luminis Platform 4.1, group leaders can view activity within their groups and can quickly access the group homepage to respond to things like submitted photos and articles or to access a live chat room. The group leader channel has a customized list of the Group Studio groups that the leader wants to monitor and the types of activities that are listed in this channel.

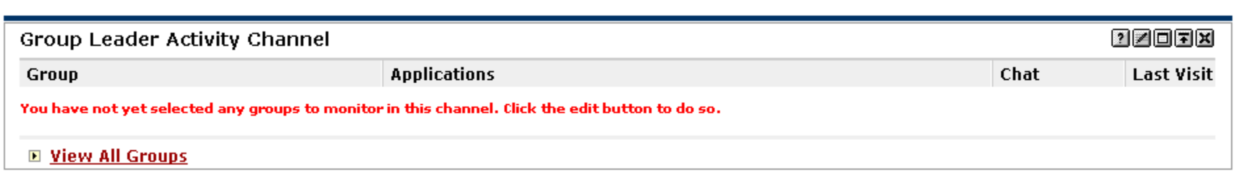
If you are the group leader, it will be indicated in the Personal Tools section:

Follow these steps to add a group leader channel and view the functionality contained within the channel.

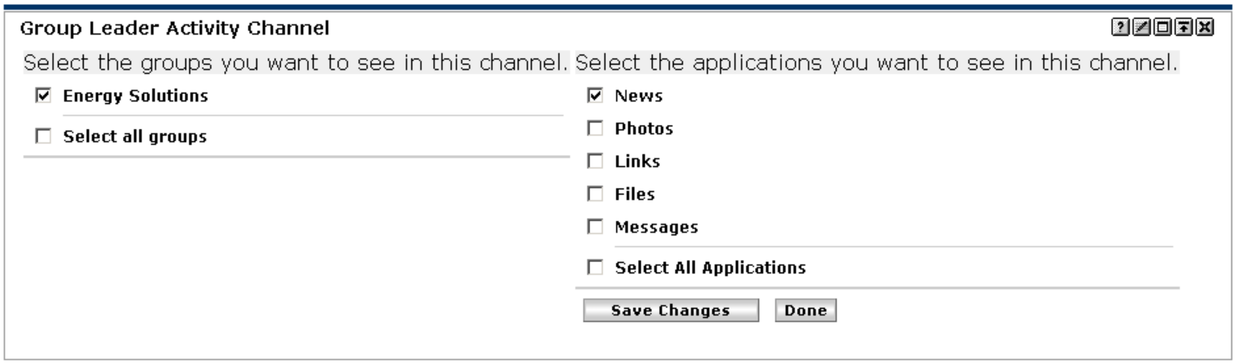
Steps

To use the tools of a group leader:

1. Click the **Content Layout** link.
2. Click the **New Channel** button.
3. In the Category field, select the option **Select All**.
4. Click the **Go** button.
5. Highlight the Channel Group Leader Activity Channel.
6. Click the **Add Channel** button.
7. Click the **Edit** button to add a group to monitor.

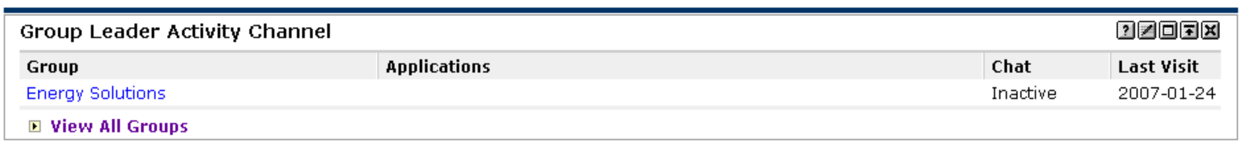


8. Select the **Group** and **Application** to monitor.



9. Click the **Save Changes** button.

10. Click **Done**.



Exercise

Setup BioChem group permissions so you are the only person who can update News for the group.

Manage Group Homepage/Set Featured Homepage Content

To maintain the featured content on the homepage you need to create and update information in three areas

- featured photo
- featured Internet link
- top 5 Internet links.

Steps

To create and maintain featured elements of the homepage:

1. Under the My Groups List section of the page you see your groups.
2. From the list, click the name of the group you want to set featured homepage content. You see the group homepage, which provides group information and—if you are the leader—a Content Tools menu similar to the following:

3. From the menu of options, click **Manage Homepage**.

Note: You see the Manage Homepage window, which illustrates the featured content that members will see and provides the ability to edit or add sections to the page.

4. To set a featured photo, locate the Featured Photo Section of the page and click **Edit**.

Note: You see the Set Featured Photo window, which provides a view of all pictures contained in the group photo album.

5. Activate the Featured Photo section by clicking the radio button next to a picture that you want to display on the homepage and then clicking **Set Photo**.

Note: If there are no photos, you will first have to post photos to the group's album.

Note: By default the Section Inactive option is checked, removing the photo from the homepage.

6. To set a featured link, locate the Featured Link section of the page and click **Edit**.

Note: You see the Set Featured Link window, which provides a view of all active links already added to the group's homepage.

7. To set the top links that appears on the homepage, locate the Top Links section of the page and click **Edit**.

Note: You see the Set Top Links window, which provides a view of all active links already added to the group's homepage.

8. Activate the Top Links section by clicking the checkboxes next to the links that you want to display on the homepage and then clicking **Set Links**.

Note: You can add up to five links. If there are no active links, you will have to first post links to the group homepage. Note also that the top links are displayed on the homepage without accompanying descriptive text.

The following sections have very similar procedures for management:

- Manage Guest View
- Manage News
- Manage Photos
- Manage Links
- Manage Files
- Manage Group Message Board
- Manage Group Calendar
- Manage Announcements

Exercise

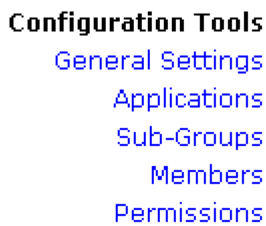
Setup the group homepage content with a message welcoming Biology and Chemistry majors to the group. Also, add a few links to the homepage content.

Configuration Tools

As the Group leader (or Group member with Group leader permissions delegated to you), you have the following group configuration responsibilities

- activating and deactivating group members (including adding members to a group and approving users for membership in restricted groups)
- managing the applications that will be available to the group through its homepage
- managing sub-groups
- assigning group homepage, application, and member management permissions to other group members

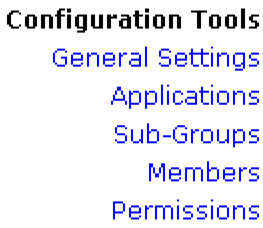
To help with these tasks, the Groups application provides the Group Leader with a set of Configuration Tools:



Steps

To change any of the general settings for the group:

1. From the list, click the name of the group you need to manage. You see the group home page, which provides group information and—if you are the leader—a Configuration Tools menu similar to the following:



2. Click the **General Settings** link.

3. Edit any of the settings (e.g., Group Name, Guest Page Description, Type, Category, etc.) as necessary.

4. When you have finished click **Save Changes.**

Note: Certain changes must be reviewed by your institution's Groups Administrator, through the Groups Administration in the System Administration Center, before they will take effect.

Managing Applications

Steps

To manage the applications available to the group:

1. Click the **Applications** link.

2. Check or uncheck the box next to any of the applications you wish to enable or disable.

3. When you have finished click **Update Settings.**

Application List

Enabled	Application	Delegable
☑	News Publishing	Yes
☑	Photo Publishing	Yes
☑	Link Publishing	Yes
☑	File Sharing	Yes
☑	Message Board	Yes
☑	Calendar	Yes
☑	Announcements	Yes
☑	E-mail	N/A
☑	Chat	N/A

Update Settings | Cancel

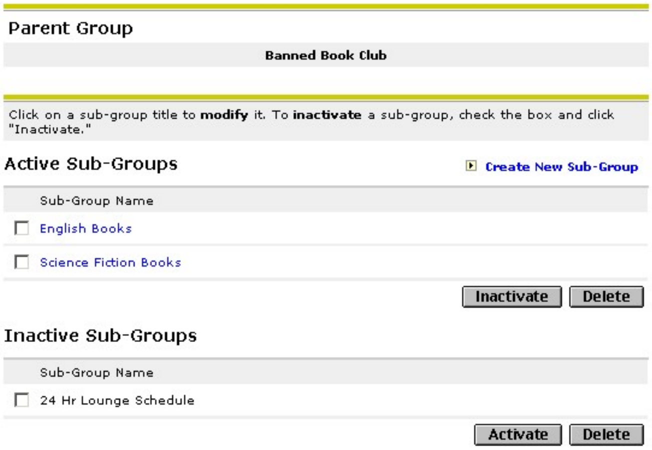
Managing Sub-groups

Steps

To manage the group's sub-groups:

1. Click the **Sub-Groups** link.

You see a screen with several options for managing sub-groups:



2. To create a new sub-group, click the **Create a New Sub-Group** link.

3. On the next screen, enter a name, title, and guest page description for the new sub-group.

4. When you have finished click **Create Group.**

5. To inactivate or delete a sub-group, check the box next to the group name and then the appropriate button in the Active Sub-Groups section.

6. To activate or delete an inactive sub-group, check the box next the sub-group's name and then click the appropriate button in the Inactive Sub-Groups section.

Exercise

Add two subgroups to your group: Biology Majors and Chemistry Majors.

Managing Members

Steps

To manage the request queue, edit the profile of any group member to change the user's status, or to delete the user from the group:

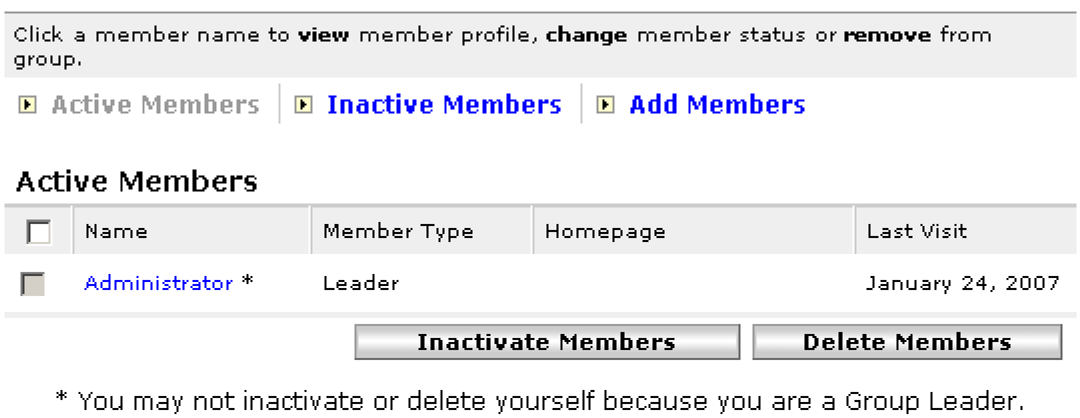
1. Click **Members**.

Note: You see the Manage Members page, which contains a list of all the group's active and inactive members, and if the group is a restricted group, all new membership requests.

2. **To activate or reject a new membership request**, you can click in the checkbox next to the requester's name and use the appropriate buttons: **Activate** or **Delete**.

Note: You are prompted to enter a reason for the action. If you are not sure whether the requester meets the criteria, click on the requester's name and follow the procedures below to edit his or her profile.

3. **To edit the member's profile**, click the member's name. You see the **Edit** Profile window, which provides the ability to change the member's status, delegate rights, or delete the member from the group.



4. Enter information in the Explanation for Action box to explain any status change or removal from the group.

Note: The text that you enter in this box will be included in the e-mail message sent to the member informing him or her of the status change or deletion.

5. **To change the member's status** (active to inactive or inactive to active), click the checkbox next to the user's name and then click the appropriate button: **Activate** or **Inactivate**.

Note: You can also activate or inactivate the user by clicking the user's name and then selecting the appropriate option from the Status drop-down on the user's profile. To remove the member from the group, click **Delete**.

Exercise

Log into the portal as a different user and request to join a newly created restricted group. Then log back into the portal with the account credentials you used when you created the group. Add the “new” person to the group with an Active status.

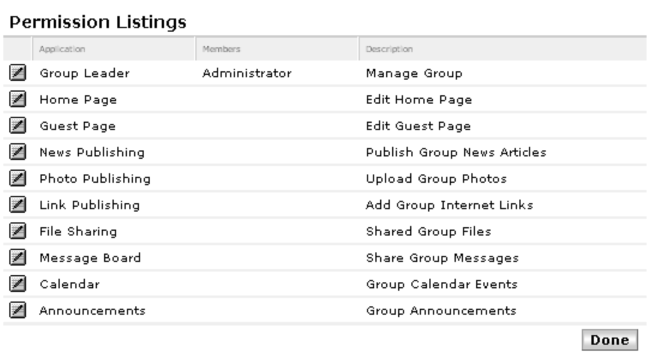
Delegating Group Homepage or Application Permissions

Steps

To delegate maintenance of the group homepage or member privileges to other group members:

1. Click **Permissions**.

You see the Permission Listings page, which contains a list of all the group's applications and members to whom they have been delegated.



To add delegated application managers, highlight one or more members in the “Current Members” choice box (using Control or Shift keys for multiple selections), then click the **Add** button.

To remove delegated application managers, highlight one or more members in the “Current Delegated Admins” choice box (using Control or Shift keys for multiple selections), then click the **Remove** button.

2. When you have finished, click the **Done** button.

Exercise

Allow the new person in the group the permission to update photos.

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

True or False: The user who submits the group request automatically becomes the group leader.

Question 2

Match the Group Types with the applicable descriptions.

	Group Type	Answer	Group Description
A	Public		The group administrator cannot view the contents of the group
B	Restricted		In order to become a member of a group, certain conditions must be met
C	Hidden		Open for anyone to join
D	Admin Blocked		These groups are not displayed in the group category index and do not have a guest view page

Answer Key

Question 1

True or False: The user who puts in the group request automatically becomes the group leader.

Question 2

	Group Type	Correct Answer	Group Description
A	Public	**D**	The group administrator cannot view the contents of the group
B	Restricted	**B**	In order to become a member of a group, certain conditions must be met
C	Hidden	**A**	Open for anyone to join
D	Admin Blocked	**C**	These groups are not displayed in the group category index and do not have a guest view page

Introduction to Luminis Roles & Access Groups

Section objectives

After completing this section you should be able to

- compare the uses of access groups and roles
- define access groups in Luminis
- assign users to access groups.

Scenario

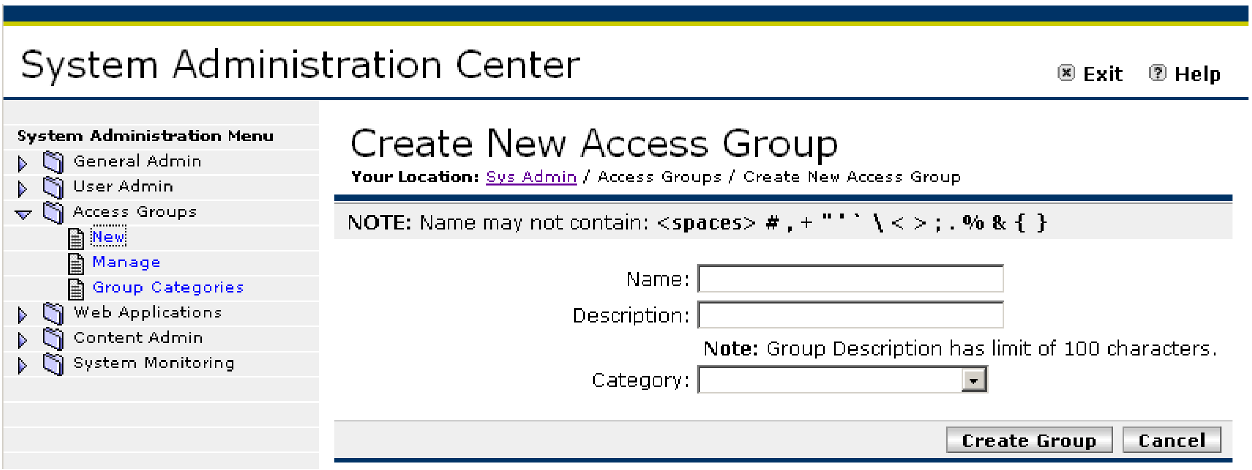
You will use access groups at your institution to determine who can perform specific actions within the Luminis Portal. You will create the Access Group called Manage Skins. People assigned to this access group will be able to create and edit color and logo sets.

Defining Access Groups in Luminis

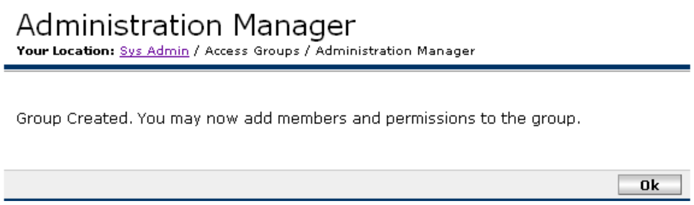
Steps

To create an access group:

1. Click the **Admin** icon.
2. Click the **Access Groups** link.
3. Click the N**ew** link.
4. The Create New Access Groups screen appears.



5. Type a name and a description for the new group in the **Name** and **Description** fields.
6. Click the **Create Group** button**.**
7. Click the **OK** button to create the group.



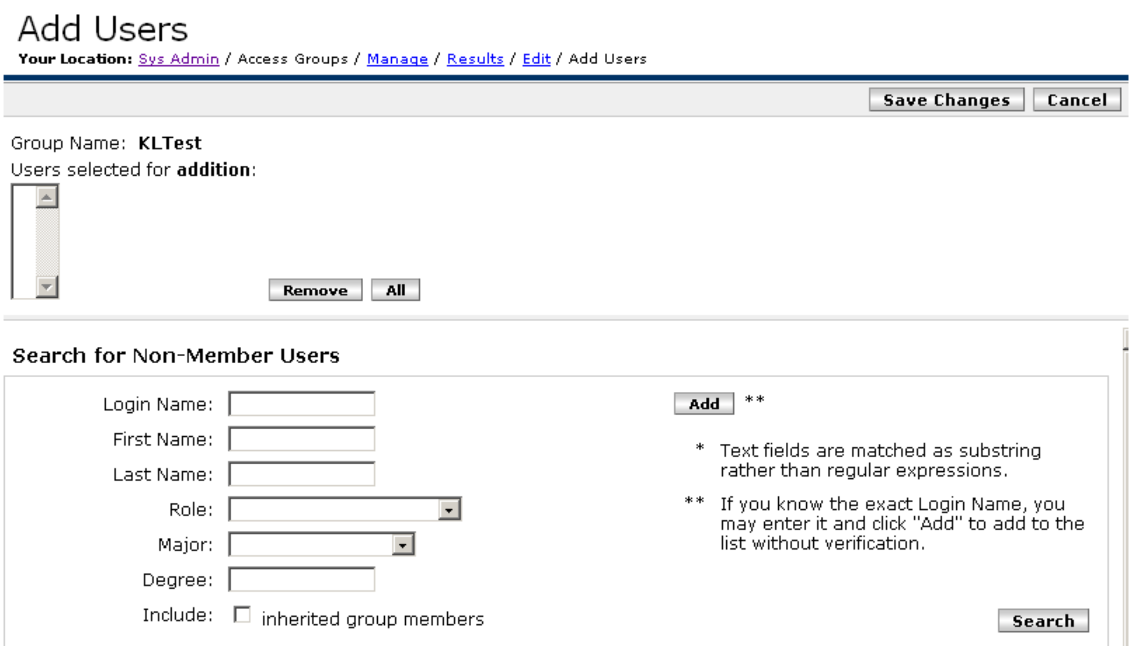
Populating Access Groups

After an access group has been defined, assign characteristics to the access group such as category, status, users, groups and permissions.

Steps

To populate an access group with information:

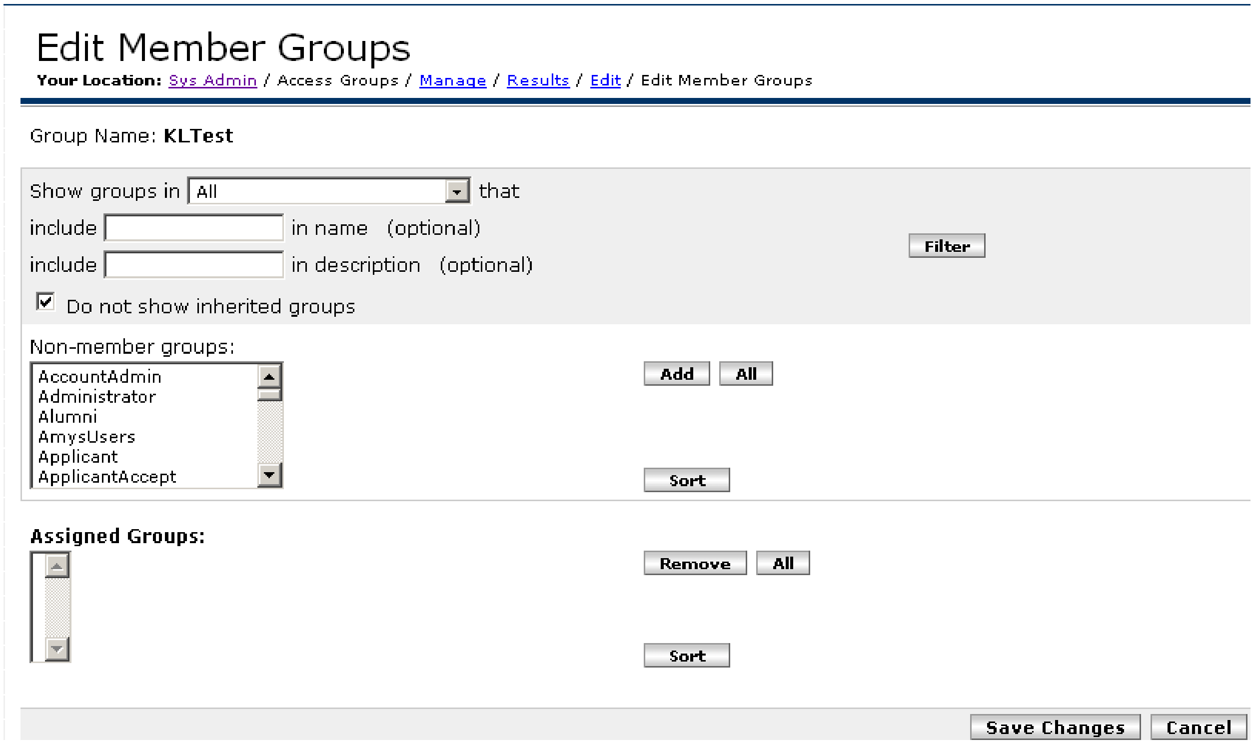
1. To add users to the group, click the **Add** button A new page appears that lets you search for and add users to the group.



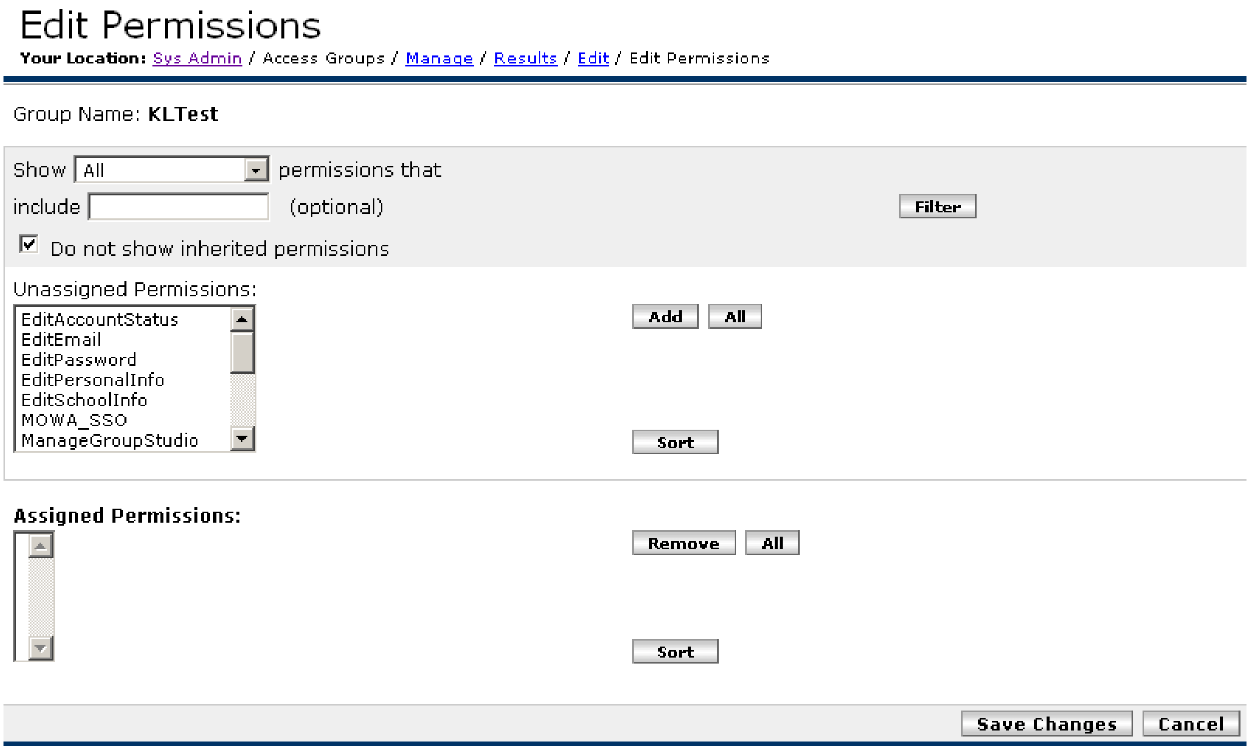
Note: Click the **Save Changes** button after users have been added to the group.

2. To remove users from the group, click the **Remove** button to the right of the Users heading. A new page appears that lets you search for and remove users from the group.

3. To add another group as a member of the selected group, click the **Edit** button to the right of the Groups heading. Select the group to add from the Non-Member Groups list box, and click the **Add** button. The group then appears in the Assigned Groups list box. Click **Save Changes** to add the group.



4. To add permissions to the selected group, click the **Edit** button to the right of the Permissions heading. Select the permission to add from the Unassigned Permissions list box and then click the **Add** button. The permission appears in the Assigned Permissions list box. Click **Save Changes** to add the permission. The only permissions you can assign in this location are the permissions that appear in the System Administration Center. To grant content administration permissions to this Access Group (for example, to grant the group the right to send Campus Announcements) you would use the Manage Permissions and Grants tool under Portal Administration.



5. To save the new settings, click the **Save Changes** button.

6. To exit without applying changes, click the **Cancel** button.

Exercise

Set up an Access group called **Update Layout Information** and assign people with a role of Portal/Content Manager to that group. Allow these people to manage skins.

Granting Permissions and Assigning Restrictions

Section objectives

After completing this section you should be able to

- establish grants
- define restrictions
- select filter groups
- test permission grants.

Scenario

You will set up permissions and grants at your institution so the right people have access to certain functionality within the Luminis Platform. For instance, you only want to let certain people send targeted announcements to the entire campus community, while you will also want to control who can publish a channel.

Establishing Grants

Using the Permissions Manager, you can delegate access to the following broad set of administrative functions and their subordinate activities

- publishing a channel
- subscribing to a channel
- creating and managing filter groups that define targeting audiences
- creating and managing layout fragments
- creating and managing targeted announcements
- creating and managing targeted content channels.

Steps

To delegate access to these administrative activities:

1. Click the **Portal Admin** link.
2. Click the **Manage Permissions and Grants** link. You see the Permission Manager and a list of the activities and applications for which you can delegate access including Channel Publication, Channel Subscription, Filter Groups Manager, Fragment Manager, Targeted Announcement Subsystem, and Targeted Content.
3. Click the expansion arrows to expand the administrative functions for which you want to delegate activity permissions.
4. Check each activity for which you want to delegate permissions then click the **Submit** button. Depending on your selections, you may need to further specify subordinate activities or specific channels, groups, or fragments that you will grant permissions to.
5. Once you have made all necessary selections, you see the Grant or Revoke Permissions window.
6. From the options in the top right corner for creating a Common Principal, click **Define** or **Select**. A Common Principal is a target audience that you want to be able to grant permission to for one or more of the available activities. When you create a common principal, the defined audience will be added to each activity

you selected along with a drop-down that allows you to grant a permission to the activity. If you wanted to grant permissions to an audience that you previously defined and saved using Filter Manager, you could click the **Select** button, which would allow you to pick from a list of your existing filter groups or to create a new filter group for use in this permission delegation and other areas. If you click **Define**, you see a Target Audience window that allows you to use Boolean operators to build a target audience based upon attributes like enrolled course, membership in a Group Studio group, roles or access groups, or individual user attributes like major or date of birth.

7. Once you have selected or defined your Common Principal, you will see an entry for the target audience next to each activity that you selected for permission delegation.

8. From the Principal drop-down for each Common Principal entry that you want to delegate, select **Grant**. Note that even though the common principal that you defined or selected has been added to each activity, you can selectively grant the permission to use the activity.

9. Click the **Submit** button. You see an informational message stating that the permissions were successfully granted. You have now authorized anyone who is a member of the target audience to perform the activities.

Exercise

Setup a permission for employees to send Personal Announcements. (Note: This example is for training purposes only, and does not represent a typical or recommended permission grant.)

Defining Restrictions and Selecting Filter Groups

If necessary, select or define an audience to impose a restriction. Restrictions allow you to further limit the target audience that a group may select from. Building on the previous exercise, if you gave individuals with the Employee role the right to create Personal Announcements, they could deliver announcements to every system user. However, if you wanted to restrict Employees to deliver Personal Announcements to biology majors only, you could define or select a Restriction audience consisting of biology major.

Testing Permission Grants

After permissions and grants have been configured, log into the system as a user who should have a specific permission set up and confirm that activity is configured correctly.

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

Name three of the administrative functions that can be delegated in the Permissions Manager.

1.____

2.____

3.____

Question 2

Which button would you click to use a Filter Group to create the Common Principal?

Answer Key

Question 1

Name three of the administrative functions that can be delegated in the Permissions Manager.

1. **Publishing a channel**
2. **Subscribing to a channel**
3. **Creating and managing Filter Groups**
4. **Creating and managing layout fragments**
5. **Creating and managing targeted announcements**
6. **Creating and managing Targeted Content channels**

Question 2

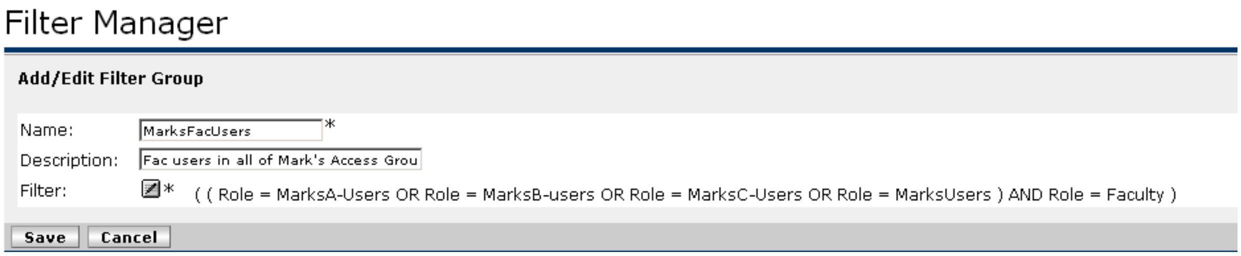
Which button would you click to use a Filter Group to create the Common Principal?

Comparing Roles, Filter Groups and Access Groups

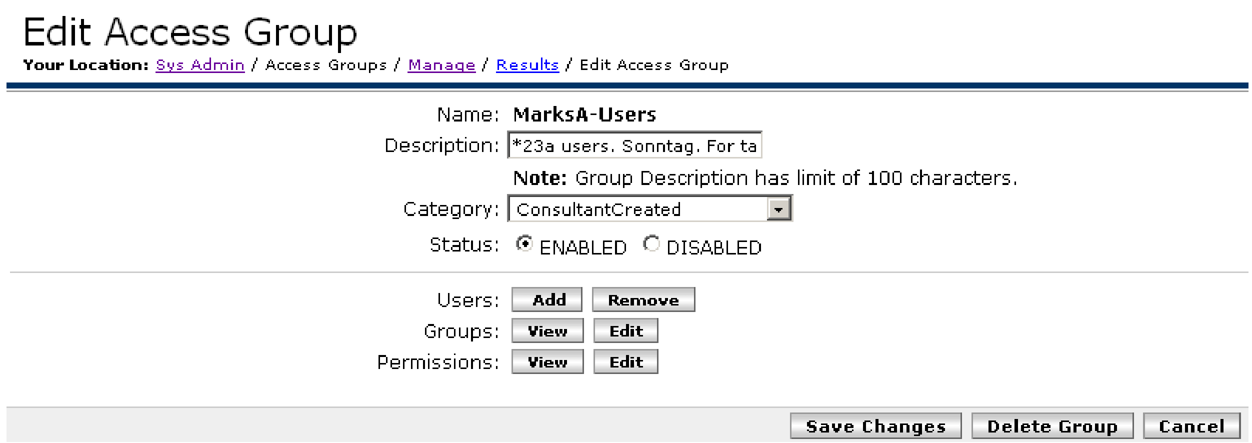
What are they?

Roles: By default Luminis Platform provides a number of standard user roles, including: admin, faculty, student, alumni, and employee. You can create additional roles by importing values from a student information system.

Filter Groups: Groups of users that meet a set of criteria that you define using attributes such as enrollment in a course, membership in a Group Studio group, roles, majors, home institution, date of birth, and the like. You can build criteria for these Filter Groups using standard Boolean operators (AND, NOT, and OR).



Access Groups: Enable you to grant limited administrator privileges (permissions) to other groups. These groups streamline account and user administration, maintain control of security policies, and reduce administrative effort. Access groups contain two components: members and permissions. All members of a group have the permissions assigned to the group.



Advantages

Roles: Can be imported from a student information system.

Filter Groups: Only have to setup Boolean logic once; reusable.

Access Groups: Delegate administrative rights to individuals.

Similarities

Roles, filter groups, and access groups can all be used when targeting:

- Fragments
- Permissions and Grants

Differences

	Roles	Filter Groups	Access Groups
Imported from a Student Information System	X		
Configured in the System Administration center			X
Configured in the Portal Administration center		X	
Used to define the audience in Targeted Announcements or Targeted Content channels	X		X
Combination of users, groups, and permissions		X	X
Can be used as criteria for filter groups	X		X
Accessed when clicking the **Select** button from the Fragment or Permissions Manager		X	
Accessed when clicking the **Define** button from the Fragment or Permissions Manager	X		X

Self Check

Directions

Use the information you have learned in this workbook to complete this self-check activity.

Question 1

Listed below will be some scenarios – write whether you would use a role or access group for each scenario.

- You need to manually enter values in the system.

- You already have the values defined in a database and just need to import them into the Luminis Platform.

- You need to use several characteristics such as major, username and group assignment.

Answer Key

Question 1

Listed below will be some scenarios – write whether you would use a role or access group for each scenario.

- You need to manually enter values in the system.

  Access Group

- You already have the values defined in a database and just need to import them.

  Role

- You need to use several characteristics such as major, username and group assignment.

  Access Group

Using Custom Targeted Announcement Channels

Use Cases

Luminis Platform 4 added capabilities for institutions to create multiple instances of the Targeted Announcements channel to meet specific needs. Use of these channels can address various niche / specialized needs while ensuring that the Personal Announcements channel can be used for need to know information such as alerts and critical action items rather than for general FYIs. Among the potential uses are the following:

- Student Activities announcements – fundraisers, community events, campus activities. In this case, Student Affairs might have access to send announcements and the channel would likely appear on a campus-life type tab in the portal.

- Low-impact technology alerts: Alerts regarding downtime for test environments, individual classroom data projectors, or other topics of interest to small numbers of users could be distributed through a custom announcement channel. Users interested in receiving such detailed alerts would subscribe to this channel, eliminating the need to push such alerts campus-wide to recipients for whom the information is irrelevant. In this scenario, technology alerts of major importance to broader audiences would be distributed via the Campus or Personal Announcements channel.

- Student services deadline / process / policy reminders: Some institutions have considered including an announcement channel on their academics / student services portal tabs to help remind students re: impending deadlines or policy compliance. Announcements to specific students concerning their status (for example, a message to students whose federal financial aid may be in jeopardy due to academic performance) should be sent to the Personal Announcement channel, even though the Financial Aid office might send announcements re: general financial aid deadlines to the Upcoming Student Deadlines announcements channel.

As institutions plan their content, it is possible that they may identify needs for such channels in the context of recruiting and admissions. As suggested in several of the examples above, it is important to remember that the nature of the message, not the sender, should determine the appropriate delivery channel, so that information of a common nature appears in a common location.

Deploying Custom Announcements Channels

Deploying custom announcement channels require several steps, outlined in more detail below:

1. Creating or identifying the access group(s) that will have rights to send announcements through the new channel, and populating these groups.

2. Building the announcement channel and targeting the channel to the appropriate audience(s).

3. Granting permissions to the appropriate access groups for sending announcements through the new announcement channel.

4. Adding the channel to user layouts, if this will be a pushed (opt-out or locked) channel.

Creating the Access Group

If the individuals who need to send announcements through the new announcements channel are not in an existing access group, you will need to create a new access group. To do this:

1. Log into the portal as a user who has an admin role.

2. Click on the Admin tool box icon [the gear icon if using XP skin] in the upper right hand corner to open the System Administration Center.

3. Select the **Access Groups** link.

4. Click the **New** icon.

5. Complete the form to identify the new access group.

6. Add appropriate users to the access group.

7. Save changes and exit the System Administration Center.

Building the Custom Announcement Channel

1. Log into the portal as a user who has Published Channel administration rights (all users with admin role have this right.)

2. Click on the Portal Admin link in the upper left hand corner.

3. Select **Publish a new channel** link from the Portal Admin page.

4. Select **JSP Model II** from the channel type list.

5. When prompted for Controller Class, enter the following: com.sct.pipeline.uportal.channels.announcements.TADisplayController

6. In the JSP Preferences window, provide the following information:

   - Fill in the **Name** field with the following: **channelID** (channel ID, w/o spaces)

   - Fill in the **Value** field with an even channel ID number you have selected.

Note: Each targeted announcement channel must be assigned a unique even number ID between 2 and 2046. Channel ID 18 is reserved for the Campus Announcements channel and channel ID 2 is reserved for the Personal Announcements channel.

7. Define the remaining parameters for the channel. Be sure to set targeting attributes to align with the appropriate audience. For example, if the announcements are needed for applicants only, then set targeting to applicants only. Otherwise, prospects could subscribe to the channel but would never receive any announcements through it.

8. Save the channel.

9. The channel should now appear in the subscription list when a user in the target audience selects **New channel** in the Manage Content / Layout page.

10. Full details appear in the Luminis System Administration Guide.

Granting Permissions to Administer Announcements through the New Channel:

1. Log into Luminis as a user with the admin role.

2. Click on the **Portal Admin** link in the upper left hand corner.

3. Click the **Manage Permissions and Grants** link.

4. Click the **Manage Targeted Announcements** link.

5. Find the newly created announcement in the list and click the checkbox to select, then press **Select**.

6. In the next page, click on the **Define** option in the Create a Common Principal

section in the upper right hand corner. A new – but undefined - permission grant will open.

7. In the newly defined grant, click on the **Define** button. Use the Expression Editor to assign permissions for this channel to the appropriate access group(s).

8. In the newly defined grant, click on the **Define** button to limit the audience for receiving announcements through this channel, as needed. For example, if the intended audience is applicants only, set the restriction to Role = Applicant. If the announcement admin can send announcements through this channel to prospects or applicants but only applicants can subscribe, no prospects would ever see the announcements sent through this channel.

9. Submit the grant. The channel should now be available to the appropriate access group(s) via the **Manage Targeted Announcements** link.

10. Go to Manage Targeted Announcements, select the capacity associated with this channel, and send a test announcement.

11. Log into the portal as a sample user in the audience associated with the channel to verify receipt of the announcement.

Optional: Making the Channel a Pushed (opt-out or locked) Channel

To add the channel to a tab so that it appears automatically for users in a role (without requiring subscription by end users), use the steps below:

1. Log into the portal as the layout owner (for example, “prospect-lo” or “dlmf_25”) associated with the fragment in which you wish to place the channel.

2. Click on the **Content Layout** link.

3. Select the tab on which you wish to place the channel.

4. Click **New Channel** in the location where you wish to place the channel.

5. Select the channel from the subscription list. You should now see its location in the Content Layout blueprint view of the tab.

6. If you wish to lock the channel in position or make it prevent its deletion, click on the channel title in Manage Content Layout view to define channel attributes.

7. In the **Adjust actions allowed by users** section adjust the selections to align with the desired settings.

8. Log out as layout owner and log in as a user with the role to which the channel is targeted to validate that the channel appears as expected in the appropriate tab.

This workbook was last updated on 3/26/2008.