BYU
HAWAII

BRIGHTSPOT®

Tutorial for Content Editors and Managers

This tutorial is specifically prepared for Brigham Young University–Hawaii's use only.

9/10/2019

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Log In

If you see the white box pop-up, use the credential below:
- Username: **debug**
- Password: **5c83a207a9faead77c91211bb3775b67**
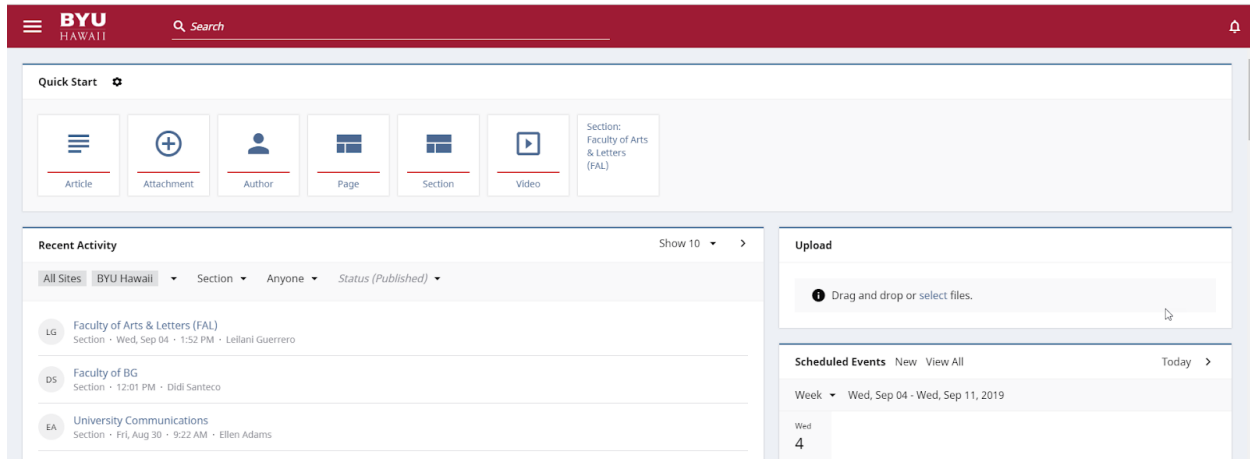- Set the browser to remember this credential

On the Login page, enter your credential:
- Username is your **BYUH email account**
- Enter your password

Dashboard

After logging in, you will be welcome by the Brightspot dashboard.

The dashboard layout includes the following tools:

1. Dashboard Home
2. Search & Advanced Search Queries
3. Quick Start
4. Recent Activity
5. Upload
6. Scheduled Events
7. Unpublished Drafts
8. Workstreams

Dashboard Home

The BYU–HAWAII logo on the top left corner takes you to the Dashboard Home.
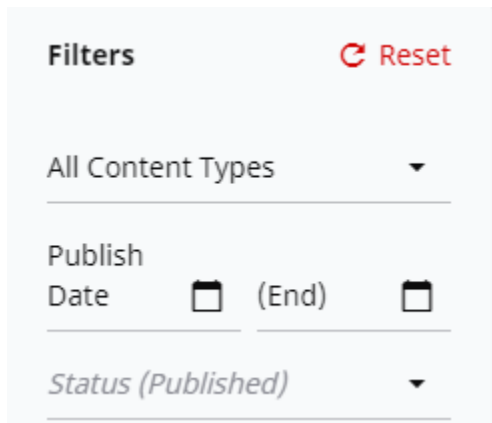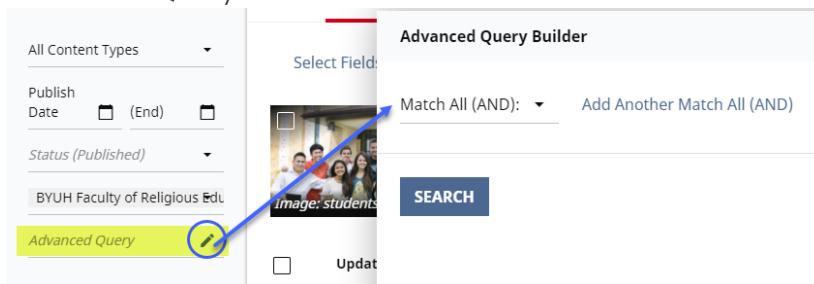
Search

Two basic search features include:

1. **Full-Text Search:** Click in the Search field and type keywords. Brightspot will quickly search for items associated with the item in the Search field. If you start typing the second character, Brightspot uses full-text search to display all items in the search panel containing words starting with the characters you typed so far.

2. **Search Result Filtering:** Full-text search can display many matching items. You can narrow the retrieved items by filtering on fields in the Filters panel. Each time a selection is made, Brightspot

immediately updates the list of filtered items. A full-text search does not need to be performed prior to filtering.

Advanced Query Search

You can narrow the specificity of their search terms even further by using the Advanced Query. Advanced Query allows users to build complex queries by either combining multiple pieces of criteria or making them mutually exclusive.

1. Click on the Edit button ✏ of **Advanced Query**.

2. The **Advanced Query Builder** page will open.

3. Select "Match All (AND)", "Match None (NOT)" or "Match Any (OR)" to specify the limitations of the search.

   - **Match All (AND)** allows you to combine search criteria, which will yield results that match all desired filters.

   - **Match Any (OR)** on the other hand, will yield any results that match either piece of criteria, but not necessarily all criteria combined.

   - **Match None (NOT)** works in the opposite way. This option will yield all results that do not match any of the search criteria determined in the filter fields, allowing you to choose criteria you want to exclude.

4. Click **Add Another** and select the appropriate filters from the dropdowns. You can continue to click Add Another to include additional criteria.

5. Click **SEARCH** to generate results when ready.

Recent Searches and Saved Searched
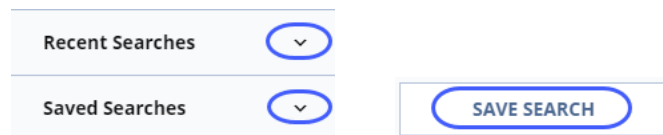
If you are frequently searching for the same content based on the same search settings, that search can be saved as a quick link in the far left panel of the search window. Brightspot will also remember your five most recent searches and have them available to you in that area.

To save a frequent search:

1. Enter your search term in the **Search** bar

2. Select additional **Filters** to create your search settings

3. Click the **Save Search** button in the far right panel of the search window

4. **Name** your Search, click **SAVE**.

5. Review your **Saved Searches** and **Recent Searches** by clicking the drop-down arrow next to each option.

Search Results

Once you have the desired list of search results. In addition to saving searches, you may take a variety of actions with the list of search results including:

1. Creating work streams

2. Bulk editing items

3. Bulk archiving items

4. Exporting item data.

To complete any of above actions, click on the associated button and continue through the associated workflow as necessary.

Quick Start
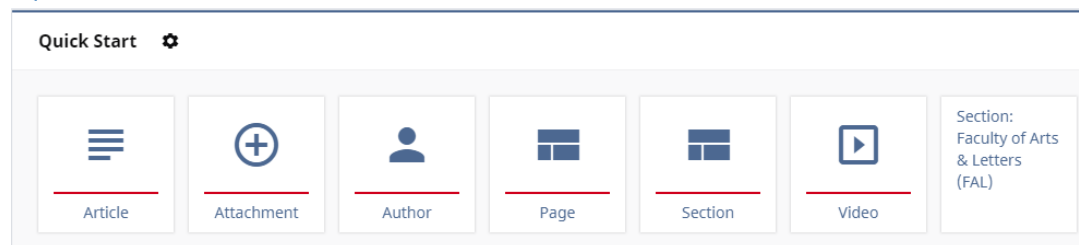
Use Quick Start to create new content or quickly access existing content that changes frequently.

1. Each icon represents a specific content type. Click on an icon from the list to create a new page. The Quick Start widget scrolls horizontally, so you can add as many content types and assets as needed.

2. Select existing items from the list to quickly begin editing a previously created item.

3. You can customize the Quick Start widget to hide certain content types you don't typically use and keep the list clean. This setting is on a per user basis, so you can set the dashboard up as you like it.

   1. Select the gear button ⚙ at the top right of the **Quick Start** widget

   2. Check off the boxes under the "**Create New**" Types section

   3. To add existing content that you will edit frequently, select "**+**" under the "**Edit Existing**" Contents section and select an existing item to add to your list

   4. Click **Save**.

Recent Activity

Recent Activity allows the user to quickly and easily perform the followings:

1. Navigate to a recently edited and published pieces of content.

2. Scroll through all edits in sets of 10, 20, or 50.

3. Filter between content types and other roles or users.

Upload

You have the options to upload a multiple files or a folder right from the dashboard.

Important note: When load multiple files or a folder, make sure all are either images or documents. ***Do not combine them*** due to different content types defined in Brightspot.

Drag and drop a file, multiple files, or a folder to the upload box.

Or click "**select**" to open the Upload Files page.

Click **CHOOSE FILES** to select the files, or click **CHOOSE A FOLDER** to select a folder. Click **UPLOAD**.

Unpublished Drafts

Unpublished Drafts section lists content that is not yet completed, but saved in a status.

DRAFT is a new page/article created, saved but not submitted for an approval yet.

REVISION is an update made to a content that has already been published live on the site and saved.

DEPT MGR REVIEW is when the content has been submitted to a department manager and waiting for his/her review to approve or reject.

UC REVIEW is when the content has been approved by a department manager and submitted to University Communication for the final review to publish or reject.

The content can also be accessed here by clicking on the blue printed content name.
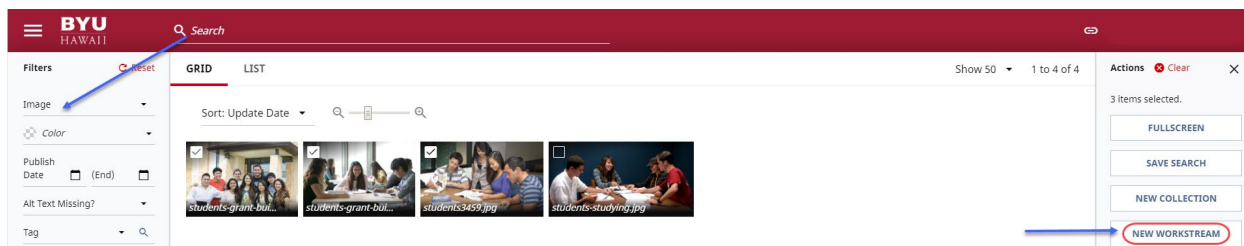
Workstreams

Worksteams is used as a list of assignments. Each assignment applies to one or more items. For example, if you load a folder of images without defining the Alt Text of Caption, you can group those images into a single workstream for the users of your site to complete them.

To create a Worksteam for the example above:

1. Start from the Dashboard, click in the **Search** bar
2. Narrow your search by choosing the Content Type of **Image**
3. Click the **NEW WORKSTEAM** button on the right panel

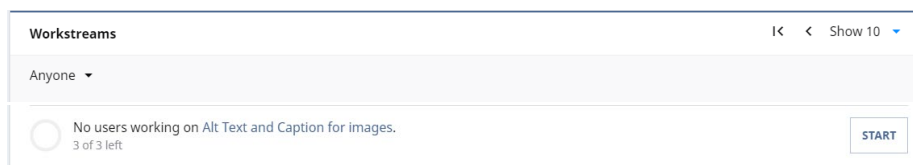4. The New Worksteam page will appear. Define the Name for the Worksteam and add a brief instructions. Click **SAVE**.
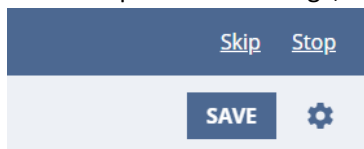

5. You will be brought back to the Dashboard. Scroll down to the Worksteams section and the new Workstream should appear.

To start working on the Worksteam:

1. Click the **START** button

2. This will open the first image, complete the task of defining the Alt Text and Caption. Click **SAVE**.

3. If you need to skip the image, click **Skip**. When you or another user open the Worksteam, it will start at the first uncompleted image.
4. Click **Stop** when you leave the Worksteam.
5. If you did not click **Stop**, on the Dashboard, the Workstream will give you the options to **CONTINUE** or **STOP**.

Image Alt Text and Caption

Alt Text (alternative text) is required to comply with the Americans with Disabilities Act (ADA). Site readers depend on Alt Text to describe images for blind and deaf blind visitors. Keep in mind that Alt Text is different from a photo caption.

Example:

Caption: Women's volleyball team hosts 2012 NEAC tournament this weekend.

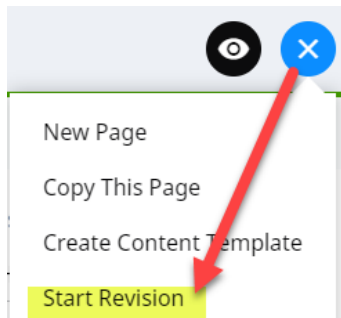**Alt Text:** Team members slap hands and clap as they congratulate each other on the court.

Modify Content - Revision

To modify content of a published page (or article, section, author), you will need to create a new Revision.

1. Open the page, article, or section

2. Click on the **gear button** ⚙ on the upper right corner of the window
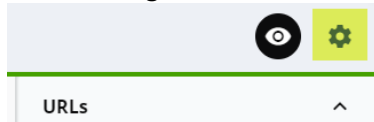

3. Select **Start Revision**

4. Make modifications needed

5. When ready to submit the changes, click **WORKFLOW** On the upper right corner of the window.

   a. **Editor:** Add a comment (optional) for the manager, then click **TO DEPT MGR** to submit
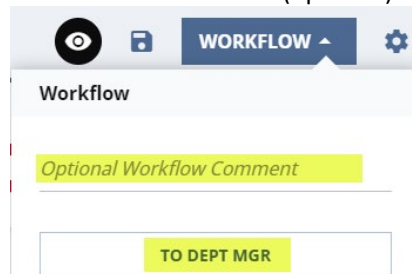
   b. **Manager**: Add a comment (optional). Click **TO UC** if ready to submit to UC. Click **BACK TO EDITOR** if you would like to send it back to the editor to make additional modifications.
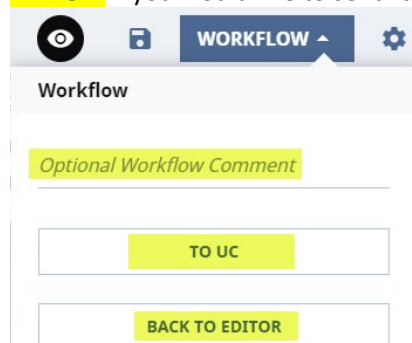
New Content vs. Copy an Existing Content

When you would like to add a new page (or article, author) and if there is an existing page that has the same settings, you have the option to copy it to a new page, then update the content.

1. Open the page, article, or section

2. Click on the **gear button** ⚙ on the upper right corner of the window

3. Select **Copy This Page** (or Article, Author)
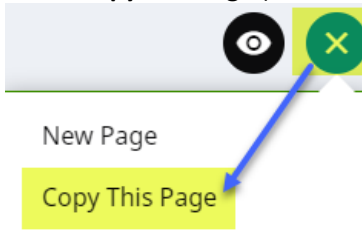
4. This creates a new page. Define the URL and update the information for the new page.

If you select **New Page** from the option, a brand new empty page will be created. You will need to define the settings and add modules, etc. from scratch.

You can also add a new content from the Search page.

1. Click in the Search bar on the top of the window.

2. On the left bottom corner of the window, locate the Create section. Select the Content Type you would like to create, click NEW.

Content Type: Section, Page, and Article

Section is the Homepage of your site. It consists of **Lead** and **Content**.

Page and Article are quite similar. The main differences are the Content module options available.

Page should be assigned to a Section. It also consists of **Lead** and **Content**.

Article also should be assigned to a Section. It consists of **Lead** and **Body**. The Body has only two options: Rich Text and List; while Page offers more Content module options.

The screenshot below is an example of a page with no Lead.

Below is the screenshot of a Section with a Lead promo.

Some popular or most frequently used lead and/or content modules:

- Promo – Full Width
- Promo – Full Witdth – Large
- List – Card, Image On Top
- List – Card, Image On Side
- List – Card, Text Only
- Gallery – Carousel
- Rich Text

Content Type: Video

There are two options to add a video to a page.

Video from a Computer or a Device
1. On the Video page, select **HTML5** as the Provider
2. Click the + button and upload the video file
3. Click the **WORKFLOW** button on the upper right corner of the page to submit the video for approval

Video: BYU–Hawaii

MAIN   OVERRIDES   METADATA   AMP   COM

Provider

HTML5   ▾

1   Video File: BYU—Hawaii _ Home Page.mp4

(+) Add Video File

Video from YouTube
1. On the Video page, select **YouTube (URL)** as the Provider
2. Add the **YouTube URL or ID**
3. Click the **WORKFLOW** button on the upper right corner of the page to submit the video for approval

Video: Hukilau

MAIN   OVERRIDES   METADATA   AMP   COM

Provider

YouTube (URL)   ▾

YouTube URL or ID

https://www.youtube.com/watch?v=CTFz8B6mz8s

Content Type: Attachment

When you have a file that you need to add to your site, use Attachment to upload the file then you can link an image or content to the attachment.

Note that files on a web page are required to comply with the Americans with Disabilities Act (ADA). Below are the links to the instructions on Accessibility Checkers on Microsoft Office and PDF.

https://support.office.com/en-us/article/improve-accessibility-with-the-accessibility-checker-a16f6de0-2f39-4a2b-8bd8-5ad801426c7f#bkmk_not

https://www.adobe.com/accessibility/products/acrobat/using-acrobat-pro-accessibility-checker.html

Follow the process below to ensure your file passes all ADA requirements:

- Run the checker on your MS Office files (Word Document, Excel, etc.) first
- Make necessary updates to pass all ADA requirements
- Save the file
- Convert the file to .pdf
- Run the checker on .pdf file
- Make necessary updates to pass all ADA requirements
- Save the file
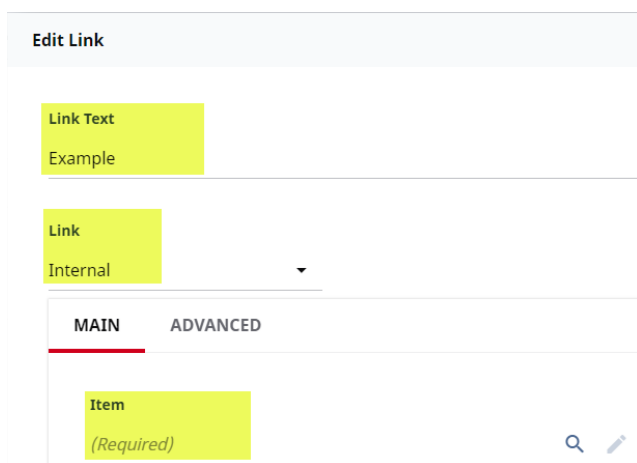
Link

Use Link 🔗 to set a clickable link to an external URL or an internal content including section, page, article, attachment or video.

1. Click the Link button 🔗 to open the Edit Link page.
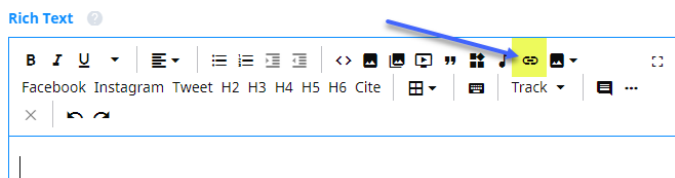
2. Type the Link Text, select either External of Internal, and specify the Item.
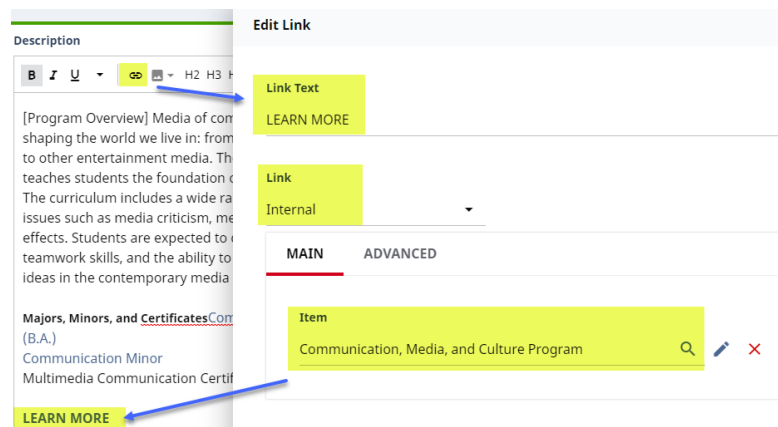
Internal Link

If the content to link is within Brightspot, use the Internal link option.

Below is an example of setting an internal link.

1. Click the Link button 🔗 to open the Edit Link page
2. Type the **Link Text**, LEARN MORE

3. Select **Internal** link type
4. Click the spyglass button 🔍 to search for the specific content you wish to link. This also works with an attachment.
5. Click **SAVE & CLOSE**
6. LEARN MORE text now appears in the content with the link

External Link

Below is an example of setting an external link.

1. Click the Link button 🔗 to open the Edit Link page
2. Type the **Link Text**, APPLY HERE
3. Select **External** link type
4. Place the **URL**
5. Click **SAVE & CLOSE**
6. APPLY HERE now appears in the content with the link

Email and Telephone Links

Below is an example of setting an **email** link.

1. Click the Link button ⊖ to open the Edit Link page
2. Type the **Link Text**, APPLY HERE
3. Select **External** link type
4. Enter the URL, start with **mailto:** and followed by the email address
5. Click **SAVE & CLOSE**
6. The email address now appears in the content with the link

Below is an example of setting a telephone link.

1. Click the Link button ⊖ to open the Edit Link page
2. Type the **Link Text**, APPLY HERE
3. Select **External** link type

4. Enter the URL, start with **tel:+** and followed by the full phone number
5. Click **SAVE & CLOSE**
6. The telephone number now appears in the content with the link