Content Pipeline Description and Procedure

Overview

The **Content Pipeline app** allows members of Campus Engagement to track the process and status of all deliverables over-time. All external communication work should be represented in this app, allowing users to fully describe projects in complete detail.

The software also informs the CES I on when to act on publishing the various deliverables.

When scheduling work writer/drivers should reference the **Article and Communication Deadlines** before entering information into the Content Pipeline.

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Definitions

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Associated product: Is any group/product associated with a specific deliverable. It's important to include this information in the details of a deliverable so that work for each service can be reported on. If there is no associated service then the work is classified as N/A.

Items: Is another word for deliverables

Publish by date: Is the exact date that a deliverable should be published by

Communication channel (types of deliverables)

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The following deliverables comprise of both external and internal communications within and outside of OIT.

- **Confluence**: CET's internal wiki for procedures and knowledge management.
- **CUE** (Calendar of University Events): The University's external public facing events calendar.
- **Digital screens**: external visual deliverables (images) that are displayed on television screens across various University buildings and organizations
- **Focus group**: selected external groups who provide feedback on internal projects
- **IT Weekly:** internal weekly newsletter delivered to OHIO IT employees
- **KBI** (Keeping Bobcats Informed): external biweekly newsletter for students and parents
- **Mass email:** an external/internal EMMA email directed at a specific population of stakeholders
- **OEN (Ohio Employee News):** external news articles directed at all OHIO employees
- **OHIO IT Updates Meeting:** internal news item to be delivered at the biweekly meeting
- **OHIO News:** external news item that is visible to all University stakeholders
- **Social Media**: external short textual and/or visual deliverable on public facing platforms
- **Survey:** internal deliverable that collects data from a predetermined population
- **Websites/TDX**: new website creation/renovation for external/internal audiences
- **Other:** all other deliverables that do not fit into the aforementioned categories

Support

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Is the type of work that is being requested. The categories can include drafting, editing, distributing, and none.

- **Drafting:** Creating draft versions of the content
- **Editing:** Editing and revising current drafts of the content
- **Distributing:** Disseminating the final content to the desired audience

Roles

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Are the three roles with available access to the Content Pipeline: manager, viewer, and writer/driver.

Manager roles:

- Access to all functions of the Content Pipeline app
- Has the ability to close out items that have either been completed or are no longer relevant
- Can change roles of users in the Content Pipeline SharePoint file
- Managers will also receive notifications:
  - Ten business days before a scheduled mass email publication
  - Three business days before a scheduled deliverable is due

Contributor roles:

- Can create items in the Content Pipeline
- Can change deliverable status

Viewer roles:

- Can only view items in the Content Pipeline, and cannot make changes

Status (of deliverables)

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Is the stage of the project in its desired timeframe.

- **Not started:** are projects that may still be in the initial stages of brainstorming and conceptual development. These can be recurring deliverables (on an annual, monthly, biweekly, or weekly schedule) that are expected, but have not yet been thoroughly considered. These items may be subject to changes in delivery timeline, scope, or even cancellation.
- **In progress:** are projects currently in the drafting stage. There may be several contributors working simultaneously in production. Drafts can change in scope over time. Depending on potential roadblocks, the delivery timeline can still change.
- **On hold:** are projects already in the drafting stage, but may have been put on hold due to various factors. Most likely, an item will be classified as On Hold if there has been a significant shift in the related project/ and or initiative, or even a change in responsible personnel.
- **Scheduled:** this designation should be reserved for mass emails that have been scheduled ahead of the publication date. The dates indicate when EMMA will automatically send a finished email to the intended recipients. This status should remain in effect until the scheduled email has published.
- **Approved:** sometimes specific deliverables may require additional approval from IT Product Managers or even members of the ITLT. This status will allow writers, drivers, editors, and publishers to know if the work is ready to move forward.
- **Submitted:** this designation is useful when a draft has been completed and *submitted* to an outside organization (such as UCM) for publication. Use this status when waiting on confirmation of publication. This status can also confirm that completed work has been forwarded on to the CES I for eventual publication.
- **Published:** indicates that a deliverable is now live, and available to the intended audience. Once an item is marked as published, the Content Pipeline app will automatically mark it as closed.

Writer/Driver

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- A member of CET who is responsible for the work being completed
- In most cases, will create the desired content
- Will place in the Content Pipeline for the CES I to publish

Procedures

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Add Item

Required information

1. Open the Content Pipeline Power App.
2. Select **Add Item**.
3. The form will open. All fields marked with an asterisk* will need to be completed.
4. Select either "Open" or "Closed" in the *Open field.
5. The **Form ID** will be auto-populated by the app.
6. Enter a brief descriptive **Title** that accurately describes the projects in a few words.
7. Select the **Publish by Date** by opening the calendar icon. Once the calendar is open:
    a. **Months** can be selected from a drop down by selecting the month name at the top of the calendar.
    b. **Years** can be selected from a drop down by selecting the year at the top of the calendar.
    c. Select the **day** of the month.
    d. Select **OK** at the bottom right of the calendar.
8. Date Submitted will auto-populate with the current date.
9. Select the appropriate ***Status** from the dropdown menu. Use the status that corresponds with the current state of the deliverable. See [status descriptions] for more information.
10. Select the ***Support** dropdown menu to describe the work that is being requested. Multiple attributes can be selected simultaneously (i.e., draft, edit, distribute, etc.).

Note: if you make a mistake while selecting the type of support you can select the X next to the selected support item to delete it from the list.

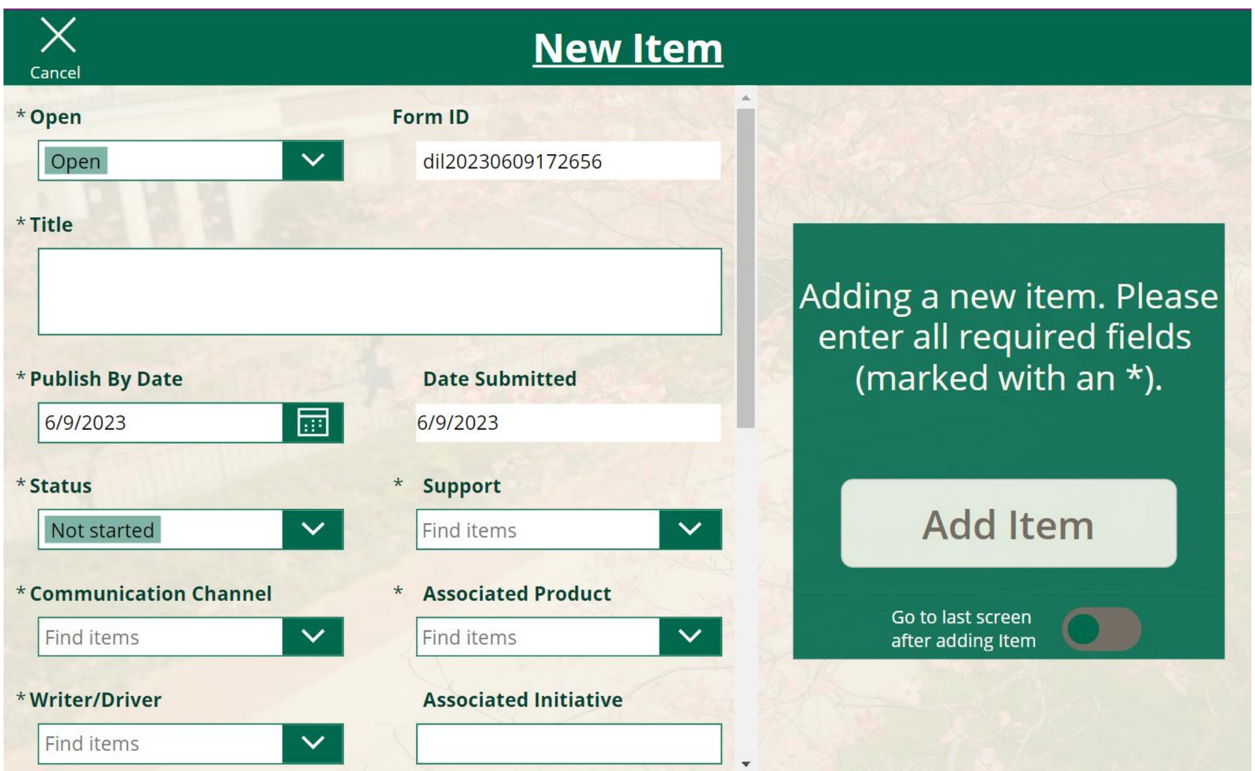
11. Choose the appropriate ***Communication Channel** (this is the type of deliverable being requested. See [Communication Channels] for more information about each type of deliverable.
12. Select the ***Associated Products** from the dropdown. If there is no related product, then choose N/A from the bottom of the list.
    - List of Associated Products:

Product Name
Academic Administrative Tools
Accounts, Passwords, and Identification Services
Collaboration & Storage
Custom Solution Delivery
Device Support
Digital Workflow
Email & Calendar
Financial Systems
Human Resource Systems
Information Security
Internet
Learning Spaces
N/A
Phones

Printing
Reporting & Data Analytics
Research Computing
Software
Strategic Initiative Support
Streaming Video
Student Administrative Systems
Surveys
Teaching & Learning Tools
Technology Accessibility
Testing
Websites

13. Select the *Writer/Driver from dropdown. All writers and drivers are current members of CET.
14. If there is no more information to add, select the Add Item button. If you do have additional information, please proceed to the next section titled Additional Information.

Note: There are several more additional fields. When creating a new item, please provide as much relevant information as possible.



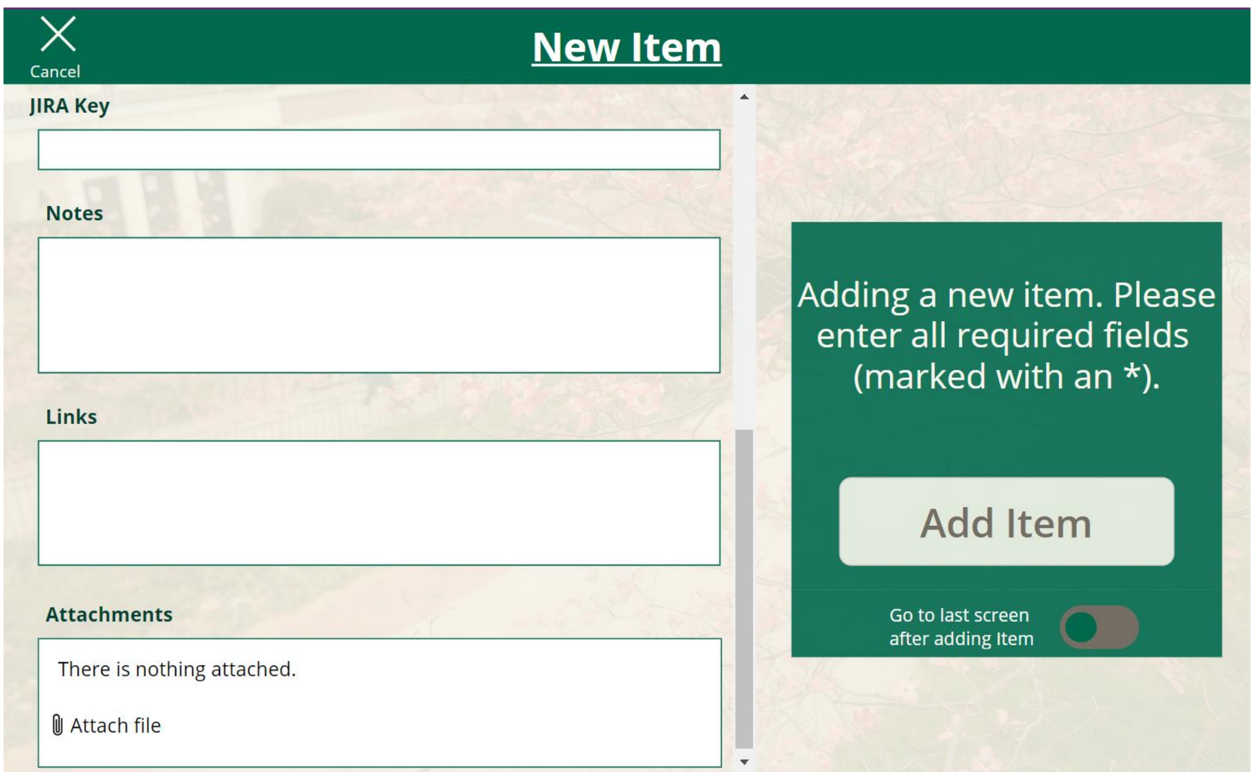
Add additional information

After completing the required entries, be sure to complete as many additional fields as possible before saving your work.

1. Add the **Associated Initiative** that is relevant to your deliverable. This is a freeform field that does not provide a list to choose from. Visit the [Major IT Initiatives] page if you are unsure which initiative the project falls under.
2. Copy the **JIRA key** from the relevant project and copy into the **JIRA key** field. This field allows you to paste the hyperlink directly (including vanity URLs).
3. The **Notes** field allows the creator to provide more context. It can also describe the purpose of the project or any potential roadblocks.
4. The **Links** field allows you to copy and paste any relevant URL's into the item. Content that is written into a Word doc should be linked here.
5. The attachments field is for any additional files that should be attached to the project, such as jpeg or png images to be included with the deliverable.
6. Select the **Add Item** button to save all fields into the project.

Notes:

1. *A Microsoft form will be coming soon to accompany the Content Pipeline. Any data entered into the form will autofill into the Content Pipeline. This form will be sharable.*
2. *It's highly recommended that all fields are completed to give the project's full context.*
3. *In some instances, projects can be marked as closed. This is useful for record keeping when a past project has already been completed but should be represented in the Content Pipeline.*



View scheduled work

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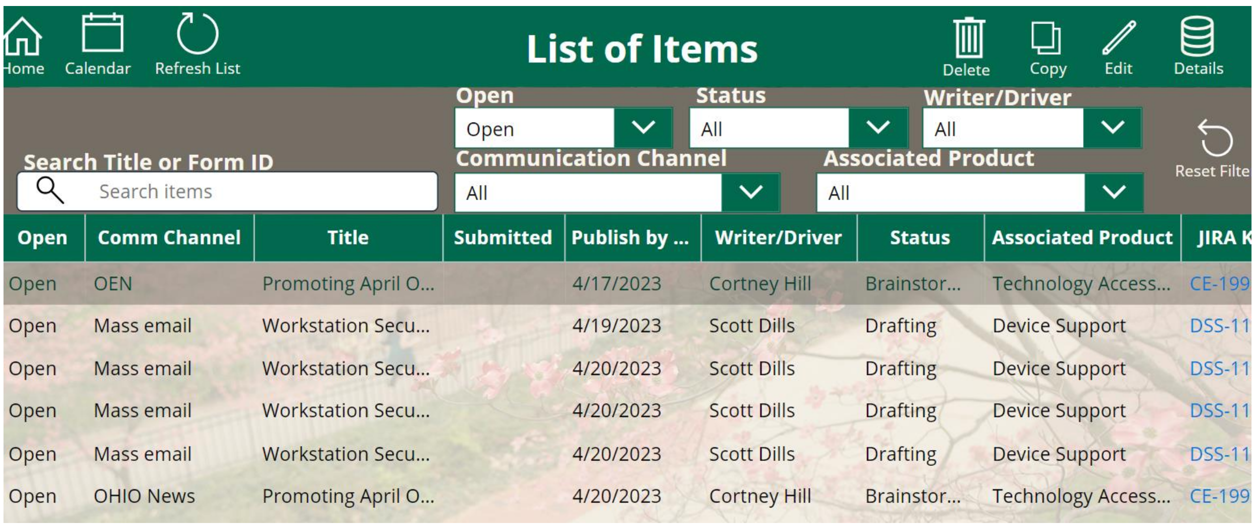
List View

1. Start on the [Content Pipeline Home Screen]
2. Select the **List View** button.
3. Select one or more attributes to locate the work you are looking for. As attributes are entered into the blank fields, the app will auto select and present all items that meet those criteria. You can search by using one or more of the following criteria:
   - Open/Closed
   - Status
   - Writer/Driver
   - Communication Channel
   - Associated Service
4. All items that meet the selection criteria will appear in a list view below the headers.



Notes:

- *You can view the item details by selecting the item from either the list view or the calendar view.*
- *Use the vertical and horizontal scroll bars to see the item details when in List View.*

Note: to see all items (both open and closed) select "All" in the open field.

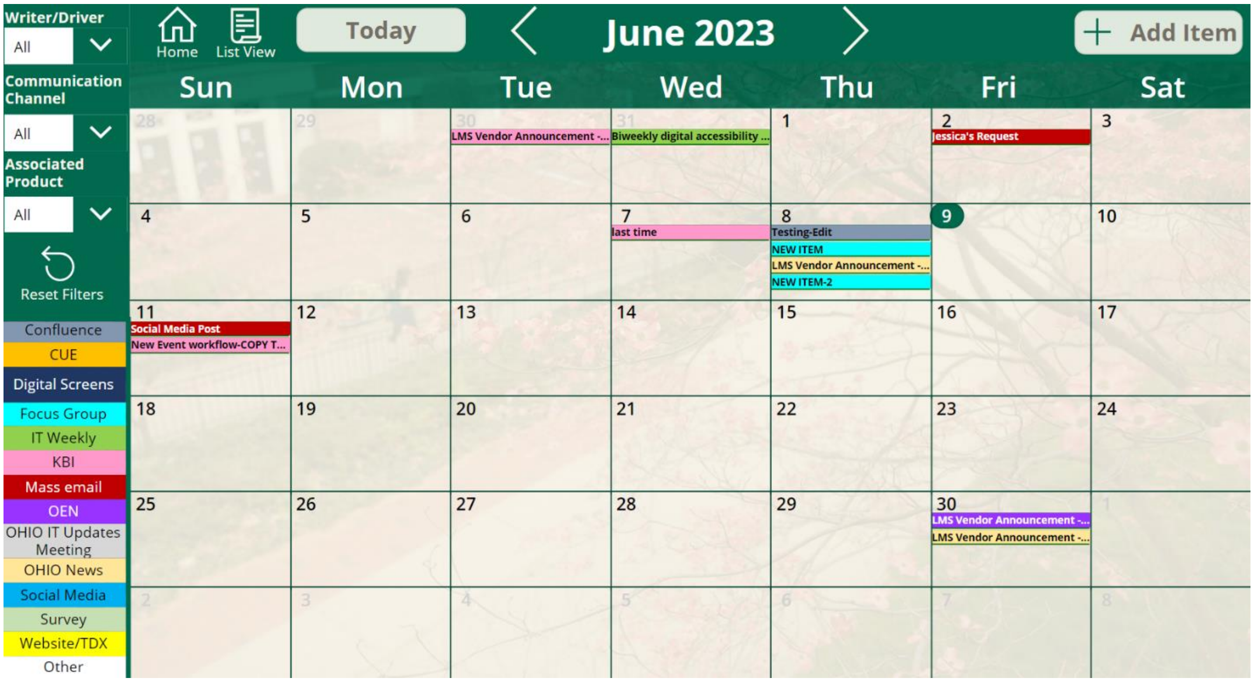
Calendar View

1. Start on the [Content Pipeline Home Screen]
2. Select the **Calendar View** button
3. Select one or more attributes to locate the work you are looking for. As attributes are entered into the blank fields, the app will auto select and present all items that meet those criteria. You can search by using one or more of the following criteria:
   - Writer/Driver
   - Communication Channel

- Associated Service

4. All items that meet the selection criteria will appear in the calendar. A legend of color coding is provided in the margin so that the viewer can see the full distribution of deliverable types in a single month.

Info: you can view the item details by selecting the item from either the list view or the calendar view.



Mass emails (viewing)

The ability to view all mass emails due within the next ten business days is only available to the manager role.

1. Start on the [Content Pipeline Home Screen](#).
2. Select the **Mass Emails 10 Days Away** button.

Edit scheduled work

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Edit from the list view

1. Highlight the item description by selecting it with your cursor.
2. Select the pencil icon to open the editor.
3. Make the desired changes in the available fields.
4. Select the save button.

Edit from the Calendar View

1. Select the item with your cursor. This will open the Item Details.
2. Select the pencil icon to open the editor.
3. Make the desired changes in the available fields.
4. Select the save button.

Edit from the Item Details window

1. Select the pencil icon to open the editor.
2. Make the desired changes in the available fields.
3. Select the save button.

SharePoint Access

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Warning: Be extremely careful while visiting the Content Pipeline SharePoint site. Changes to the site may make the Content Pipeline app unusable. For advanced changes to the SharePoint (outside of the scope below) please consult with Jessica Shuler from Digital Workflow, or Scott Dills before proceeding.

Change a person's role

1. Visit the Content Pipeline's **SharePoint site**.
2. Select **CE_ALL_UserAccess** from the left navigation menu
3. Select the person's profile you intend to edit. The line will become highlighted, and a checkmark will appear to the left.
4. Select the **Edit** button from the top menu.
5. A panel will open to the right.
6. Select the field under the heading titled **Level** with your cursor. The field will be marked as Viewer, Contributor, or Manager.
7. A dropdown will appear.
8. Select the new role from the dropdown.
9. Select the **Save button**.

Export site contents

Content Pipeline data can be exported for reporting purposes.

1. Visit the Content Pipeline's **SharePoint site**.
2. Select Site contents from the left navigation menu.
3. You can export one of three items:
   a. **CE Content Pipeline Form Data**: This is all data that has been entered into the Content Pipeline.
   b. **CE_ALL_UserAccess**: All current users with access.
   c. **CE_Content Pipeline Comments**: This file holds all comment data form each Item profile.
4. Once the desired list is open, select the Export button from the site's top menu. It will open a dropdown menu with the option to export as a CSV, Excel, or Power BI file.

New users (how to add)

Contact **Jessica Shuler** from Digital Workflow, or **Scott Dills** to add a new user to the SharePoint site.