# CUSTOMIZING PRESENTATION MAKER

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#### I. INTRODUCTION

Presentation Maker is a forms-based template for the Presentations tool that makes it easy for Oncourse Users to create, customize, and share Web-based presentations such as showcase portfolios and other types of simple Web sites. Standard versions of the templates are published globally, which means they are available for use in any site with the Presentations tool. It's also possible to customize the template to make it better suited for a specific purpose. This guide explains how to customize the template and associated forms and renderers. It is intended only for users who already have the following background and skills:

- Basic XML Schema Definition authoring skills, including editing XSD source code
- Proficiency with the ePortfolio Forms tool, including adding, importing, exporting, and modifying forms
- Experience using the Presentation Maker template to create a simple web site (for more information, see the companion guide "Creating and Publishing Presentations with Presentation Maker").

### **II. PREPARING THE WORK ENVIRONMENT**

If this is your first time customizing the Presentation Maker template, there are several steps you should complete to prepare for the work ahead.

- Make sure you have access to a good ASCII text editor or an XML editor. The oXygen XML editor is available for download in the Utilities section of the <u>IUWare Web site</u>. OXygen has a validation engine that highlights invalid XML.
- 2. Download the standard template file from Oncourse that best matches the purpose of your project. The following templates are available for download:
  - Presentation Maker Academic Portfolio (this template uses specific section names and prompts to help users create a personal showcase/presentation portfolio)
     <u>https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Presentation%20Maker/Presentation%20Maker%20-%20Personal%20Academic%20Web%20Site.zip</u>
  - Presentation Maker Simple Web Site (this template uses generic section names and generic placeholder text)
     <u>https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Presentation%20Maker/Presentation%20Maker/20-%20Generic%20Web%20Site.zip</u>

To see working examples of these templates, join the public demo site named **Presentation Maker** and create a presentation with each template. By doing so, you'll be able to see the section names and prompts used in each.

 All customization work should be completed and tested in a practice site before moving the components to a production site. If you don't have a practice portfolio site, you can request one using the Oncourse Site Request form.

### **III. PLANNING YOUR TEMPLATE CHANGES**

Before implementing any changes to the template or the related forms, map out the changes you intend to make on paper. Use **Appendix A** at the end of this guide to specify and plan the changes you want to make.

The following template characteristics can be changed:

- 1. **Title and description of the template**. The title and description can be modified to reflect the nature of the project that the template will support or facilitate.
- 2. The number of sections in the template. The Presentation Maker template can be used to create a Web site consisting of up to seven sections. Each section is represented by a link in the main navigation menu (1) which runs horizontally across the page beneath the banner. A template can hold up to nine sections.



The number of pages in each section. Each section in a presentation can contain one or more pages. If the section has two or more pages, a secondary navigation menu appears down the right or left side of the page (2). By default, the creator of a presentation can add an unlimited number of pages to each section. It is, however, possible to restrict the number of pages that can be added to a given section.



4. The descriptive title and instructions for each section. Each section can have a descriptive title (3) that suggests the purpose of the section to the user. The section title does not display in the published presentation. It merely functions as a guide to help the user understand the type of content that should be produced for the section. For example, if you want your students to include a section in the presentation about their career goals, you can choose a title like Goals or Career Goals.

Brief instructions to the user (4) can be added beneath the title of each section. Draft the instructions you would like to use for each section in your template.

mmary Add/Edit Content	
elect items to use in this presentation.	
3 Welcome	Available Items:
Please select or create the Welcome section you would like to use in this	please select an item 🔹
presentation. 4	Create New   Edit Selected   Remove Selected

5. The default name for each section in the main navigation menu. When the user creates a new section, the field that determines the section name in the main menu can be pre-populated with the same value as the section name in the template (5). This is especially useful if you want all students to use standard names for each section.



6. **The placeholder content for the WYSIWYG editor**. When the user creates a new section or page, the WYSIWYG editor can be pre-populated with formatted content (6) to help the user develop appropriate content or with a template for entering structured content, such as a resume. If you plan to use placeholder text in one or more sections, draft the text for each section.



7. **The list of selectable themes.** A theme applies a common look and feel to all of the sections and pages in the presentation. With the exception of the "build your own" theme, most of the currently available themes are campus-specific. You can remove themes from the Theme menu (7) that do not apply to your campus or program.



# IV. IMPORTING THE TEMPLATE

In order to modify a template, you'll first **need** to import a copy of the template into the Presentation Templates tool in a practice portfolio site. You should have already downloaded the template you want to customize. If not, refer back to section II. Then use the instructions below to import the template.

- 1. Log in to Oncourse and go to your practice portfolio site.
- 2. Upload the template file (a .zip archive) into the Resources tool in your practice site.
- 3. Open the Presentation Templates tool.
- 4. On the Manage Presentations Templates screen, click Import (in the menu at the upper left).
- 5. On the Import Template screen, click **Select File** to display a list of files in Resources.
- 6. On the Add Attachment screen, locate the template file you uploaded in step 2 above and click **Select** to the right of its name. The selected file will be listed at the top of the page under Items to Attach.
- 7. Scroll to the bottom of the Add Attachment screen and click **Continue** to return to the Import Template screen.
- Click Import to complete the import process. In a few seconds, you will be returned to the Manage Presentations Templates screen. The imported template will appear in the list of available templates. In addition, the forms associated with each section of the template will be listed on the Manage Forms page of the Forms tool.
- To make the template available to other users in the site, click Publish on the Manage Presentation Templates page.

### V. EDITING THE TEMPLATE SECTION TITLES, DESCRIPTIONS, AND ORDER

By now, you should have determined how many sections your template will contain, the order of the sections, and the descriptive title and instructions for each section (refer to your completed Template Planner, Appendix A). To implement these changes, we will modify the template as described below:

- 1. In the practice site where you imported the template, open the Presentation Templates tool.
- 2. Click Edit to the right of the template's name.
- 3. On Step 1 of 4, enter a revised name and description for the template, if desired, and then click **Continue**. **Note**: Try to include the words "Presentation Maker" in the name because the user guide refers to this name.
- 4. On Step 2 of 4, click **Continue** to advance to the next screen.
- 5. The Step 3 of 4 screen shows the current structure of the template. Each section is represented by a row in the content list:

Sequence	Title	
1	Welcome	Edit   Delete
2	About Me	Edit   Delete
3	Goals	Edit   Delete
4	Philosophy	Edit   Delete
5	Classes & Projects	Edit   Delete
6	Work Showcase	Edit   Delete
7	Optional Section 1	Edit   Delete
8	Optional Section 2	Edit   Delete
9	Resume	Edit   Delete
Continue	Back Finish	Cancel

From here you can delete, rearrange, and/or change the name and instructions for any section as described below

#### A. DELETING AND REORDERING SECTIONS

- 1. To delete a section, click Delete to the right of the section name. The section will be deleted without confirmation.
- 2. The sequence numbers to the left of each section name determine the order in which the sections will appear in the Presentations tool. To change the order of the sections, revise the numbers to reflect the desired order. Then click Add to List and ignore the "required" alerts next to the fields at the top of the page. The sections will be sorted according to reflect the new sequence numbers.
- 3. The sequence numbers only affect the order in which the sections are displayed in the template, not the order of the sections in the main menu of the published presentation. Proceed to the next section (V.B) to change the order in the published presentation, and optionally to change the titles and descriptions for each section of the template.

# **B. EDITING SECTIONS**

You may edit the title or description (instructions) for any section in the content list on the Step 3 of 4 screen. Also, if you deleted or reordered sections, you'll need to update the Name field, which controls the section order in the published presentation. To change any of these fields, follow these steps:

1. In the content list, click Edit next to the name of the first section in the list (sequence number 1). You should see a screen that looks similar to the one below:

Step 3 of 4	
Ple The number follow must match the se	ing the word "Page" ction's Sequence number.
<ul> <li>Type</li> <li>Name</li> <li>Title</li> <li>Description</li> </ul>	Welcome 9
Allow Multiple Selection	ate the Welcome section you would like to use in this presentation.
No     Save Changes	
Sequence Title	
() Welcome	Edit   Delete
2 About Me	Edit   Delete
3 Goals	Edit   Delete

- 2. In the Name field, the number following the word "Page" (8) determines the order of the sections in the main menu of the published presentation. This number must match the sequence number for the section in the bottom of the screen (e.g., the value in the name field for the section with sequence number 1 should be Page1, the value for the section with sequence number 2 should be Page2, and so on). Be sure to capitalize the "P" in "Page" and do not put any spaces in the name.
- The values in Title and Description fields are what the user sees when s/he is working with the template. The
  Title is a descriptive name for the section and the Description provides brief instructions to the user for
  creating or selecting the content for the section (see illustration on page 4). Edit the Title (9) and Description
  (10) for the section as desired.
- 4. When you are finished making changes, click **Save Changes**.
- 5. Repeat steps 1 through 4 for each section you want to modify.
- 6. When you are finished making changes to each section, click **Finish** at the bottom of the page.
- 7. Finally, if you changed the titles of any section, it's a good idea to update the name of the form associated with the section so they match. To do so, follow the instructions in section V.C below.

# C. RENAMING FORMS TO MATCH REVISED SECTION NAMES

The names of the forms in the unedited version of the template match the original names of the sections. If you revised the section names, you should revise the form names to match the new section names. This is a two-step process. First, we'll edit the template and record the name of the form associated with each section. Then we'll use the Forms tool to rename the forms as necessary. Follow the steps below:

- 1. Open the Presentations Templates tool in the practice site where the template is located.
- 2. On the Manage Presentation Templates page, click Edit to the right of the template you recently modified.
- 3. Click **Continue** on the Step 1 of 4 and Step 2 of 4 screens.
- You should be on Step 3 of 4, List Content. Click Edit for the first section in the content list. The Type field

   (11) shows name of the form associated with the section. Jot down both the title of the section and the name of the associated form.

Step 3 of 4	
Please specify items tha uploading files.	t will appear in the presentation. Users of the template will fill in content from their resources or by
* Туре	About Me (Presentation Maker)
* Name	Page2
* Title	About Me
Description	
Please select or c	eate the About Me section you would like to use in this presentation.
Allow Multiple Selection	on
© Yes	
No	

- 5. Repeat step 4 for each section in the list.
- 6. Once you have recorded each section title/form combination, click **Cancel** to return to the Manage Presentation Templates screen.
- 7. Open the Forms tool.
- 8. Referring to your list of section titles and associated forms, find the first item in the list with a form name that does not match the section title.
- 9. Locate the form with the mismatched name on the Manage Forms page and click Edit.
- 10. Change the value in the Name field (12) to match the section name and click **Save Changes** to save the form under the new name.

Edit Form	
Please edit your form properties	
Required items marked with *	
* Name	About Me 12
Schema File (xsd)	Select Schema File
Document Root Node	•
Instruction	

11. Repeat steps 7 through 10 for each section in the list with a mismatched form name.

# VI. MODIFYING THE TEMPLATE FORMS AND FORM RENDERERS

The form and form renderer associated with each section of the template control:

- the placeholder content that the user will see each time she creates a new page for the section.
- the default name for each section in the main navigation menu
- the maximum number of pages permitted in each section

The instructions below describe how to change these characteristics.

### A. CUSTOMIZING THE PLACEHOLDER CONTENT FOR A SECTION

Each form has default placeholder content that displays in the CK editor when the user creates a new page. The placeholder content can be used to guide the user through the process of creating the page or to create a sample page layout that can be modified by the user. To modify the text, follow these instructions:

- 1. Open the Forms tool in your practice site.
- 2. On the Manage Forms page, locate the form with the placeholder text you want to change.
- 3. Click **Edit** under the form's name.
- 4. The placeholder content is stored in the Instruction field of the form. Edit or replace the existing content with your new content. Format your content using the CK editor toolbar.
- 5. When you are finished editing the content, click **Preview** to view the rendered version of the form.
- 6. Click **Return** to return to the Edit Form screen.
- 7. If you were satisfied with the preview, click **Save Changes**. Or, if you wish to make additional changes to the content, repeat steps 4-6 before saving your changes.

#### B. CUSTOMIZING THE DEFAULT NAME FOR EACH SECTION IN THE MAIN NAVIGATION MENU

The default name for each section in the main navigation menu is stored in the alternate renderer (an XSLT file) associated with each form. If you are not sure what the current default name is, use the Forms tool to edit each form and, on the Edit Form screen, click **Preview**. The default name appears in the Main Menu Link Name field (13).



To edit the default text that appears in the Main Menu Link Name field for each section, follow these steps:

- 1. Download the following XSL file: <u>https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Presentation%</u> <u>20Maker/formCreate-SectionName.xsl</u>
- 2. Open the above file in an XML or plain text editor.
- 3. Locate the following line in the source code

<xsl:template name="title-default">Default Section Name</xsl:template>

and replace the string "Default Section Name" with the desired default text for the Main Menu Link Name field.

- 4. Save the revised XSL file with a name like formCreate-*sectionname*.xsl where the variable *sectionname* is replaced with the name of the corresponding section (e.g., formCreate-AboutMe.xsl).
- 5. Upload the XSL file to Resources in your practice site.
- 6. Open the Forms tool in your practice site, and on the Manage Forms page, locate the form that will use the modified renderer. Click Edit to open the form.
- Before you can attach the new renderer, you must remove the current renderer and save the form. On the Edit Form screen, under Advanced Options, click Select Xsl file for the Alternate Form Creation Renderer (14):

Advanced Options				
Alternate Form Creation Renderer (xsl)	formCreate_AboutMe.xs	Select Xsl File	14	
Alternate Form View Renderer (xsl)		Select Xsl File		
Save Changes Preview	Cancel			

- 8. On the Select Xsl File screen, click **Remove** next to the XSL file listed under Items to Attach.
- 9. On the Select Xsl File screen, locate the XSL file you uploaded in step 9 above and click **Select** to the right of its name. The selected file will be listed at the top of the page under Items to Attach.
- 10. Scroll to the bottom of the Select Xsl File screen and click **Continue** to return to the Edit Form screen.
- 11. Click **Save** Changes to save your modifications.
- 12. Finally, to preview the form with the new renderer, click Edit to open the form again.
- 13. Click **Preview** to view the form as it will appear in the template. The Main Menu Link Name field should contain the default text you entered in step 3 above. When you are finished, click **Return** to go back to the Edit Form screen.
- 14. Click **Cancel** or **Save Changes** to return to the Manage Forms page.

# C. RESTRICTING THE NUMBER OF PAGES IN A SECTION

By default, there are no restrictions on the number of pages that can be added to each section of the presentation. To limit the number of pages that can be added to a section, create a new form for the section using the guidelines below.

- 1. Download and save the following XML Schema Definition files.
  - singlePageSection.xsd (use this schema file as is if you want to limit a section to a single page) <a href="https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Presentation%20Maker/singlePageSection.xsd">https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Presentation%20Maker/singlePageSection.xsd</a>

- multiPagesSection.xsd (you will modify this schema if you want to restrict the number of pages to 2 or more)
   https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Presentation%20Maker/multiPageSection.xsd
- 2. Download and save the following form renderers:
  - **iuPageComposer\_formView.xsl** (this will be the alternate form view renderer for your new form). <u>https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Prese</u> <u>ntation%20Maker/iuPageComposer\_formView.xsl</u>
  - formCreate-SectionName.xsl (you will modify this form create renderer according to the instructions in section VI.B above to specify the default name for the section in the main navigation menu) <u>https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Prese</u> <u>ntation%20Maker/formCreate-SectionName.xsl</u>
- If you want to limit the number of pages in the section to just one, skip to step 4. If you want to limit the number of pages to two or more, open the file named multiPagesSection.xsd in an XML or plain text editor. Locate the following line:

<xs:element name="subPage" minOccurs="0" maxOccurs="unbounded">

- 4. Save the XSD file with a new name (be sure to give it an .xsd extension) and exit the XML or text editor.
- 5. Open the file named **formCreate-SectionName.xsl** edit, following the instructions in section VI.B, steps 1-4.
- 6. Upload the XSD with the desired page restrictions to the Resources tool in your practice site.
- 7. Upload the two renderers (i.e., **iuPageComposer\_formView.xsl** and the modified version of **formCreate-SectionName.xsl**) to Resources.
- 8. Now you'll need to create a new form based on the modified scheme. Open the Forms tool.
- 9. Click Add.
- 10. In the **Name** field, enter a display name for the form.
- 11. Click Select Schema File.
- 12. On the Select Schema File screen, locate the XSD file you uploaded in step 6 above and click **Select** to the right of its name. The selected file will be listed at the top of the page under Items to Attach.
- 13. Scroll to the bottom of the Select Schema File screen and click **Continue** to return to the Edit Form screen.
- 14. In the Instructions field, enter the placeholder content for the section.
- 15. On the Edit Form screen, under Advanced Options > Alternate Form Creation Renderer, click Select Xsl file.
- 16. On the Select Xsl File screen, locate the form create renderer you uploaded in step 7 above and click **Select** to the right of its name. The selected file will be listed at the top of the page under Items to Attach.
- 17. Scroll to the bottom of the Select Xsl File screen and click **Continue** to return to the Edit Form screen.
- 18. On the Edit Form screen, under Advanced Options > Alternate Form View Renderer, click Select Xsl file.

- 19. On the Select Xsl File screen, locate the file named **iuPageComposer\_formView.xsl** and click **Select** to the right of its name. The selected file will be listed at the top of the page under Items to Attach.
- 20. Scroll to the bottom of the Select Xsl File screen and click **Continue** to return to the Edit Form screen.
- 21. To preview your modifications, click **Preview**. You may enter test data to validate the revised form. Then click **Return** to go back to the Edit Form screen.
- 22. Click **Save Changes** to save your modifications.
- 23. Open the Presentation Templates tool.
- 24. Edit the template that will use the new form.
- 25. Click **Continue** twice to get to Step 3 of 4.
- 26. Click Edit next to the section name that will use the new form.
- 27. Using the Type dropdown, select your new form to associate it with the section.
- 28. Click Save Changes and then click Finish.
- 29. Repeat steps 3-27 for each form you wish to modify.

# VII. MODIFYING THE LIST OF AVAILABLE THEMES

The Presentation Maker template includes several pre-defined themes. Most of the currently available themes are specific to the IUPUI campus because IUPUI provided half of the funding to develop the template. However, there is a Crimson theme for each IU campus as well as a "build your own" option. If some of the themes do not pertain to your campus, school, or project, you can remove them from the list available to your users. To do so, follow these steps:

- 1. The template themes are specified in the IU Outline Options form. Download and save a copy of the schema definition and renderer for this form:
  - <u>https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Prese</u> ntation%20Maker/IU%20Outline%20Options.xsd
  - <u>https://oncourse.iu.edu/access/content/group/PortfolioAdmin/samples%20and%20templates/Prese</u> ntation%20Maker/createIUOptionsForm.xslt
- 2. Open IU Outline Options.xsd in an XML or plain text editor.
- Locate the declaration for the element named "theme". It begins with the line: <xs:element name="theme" minOccurs="0">
- Nested between the <xs:restriction> tags for this element are the enumerations for each theme. Each enumeration displays as an option in the Theme menu in the Required Settings form (see illustration on page 5). To remove a theme from the menu, delete the XML source code for the corresponding enumeration. For example, to remove the IUPUI Jaguar Logo theme from the menu, delete the following lines from the XSD file:

<xs:enumeration value="jaguar"> <xs:annotation> <xs:documentation>IUPUI Jaguar Logo</xs:documentation> </xs:annotation> </xs:enumeration>

For each theme you want to delete, be sure to delete the corresponding enumeration's start and end tags and everything in between.

5. Save the form with a new name, taking care to preserve the .xsd extension.

- 6. Upload the modified XSD file and the renderer, **createIUOptionsForm.xslt**, to the Resources tool in your practice site.
- 7. Open the Forms tool in your practice site.
- 8. Click Add.
- 9. In the **Name** field, enter a display name for the form.
- 10. Click Select Schema File.
- 11. On the Select Schema File screen, locate the XSD file you uploaded in step 6 above and click **Select** to the right of its name. The selected file will be listed at the top of the page under Items to Attach.
- 12. Scroll to the bottom of the Select Schema File screen and click **Continue** to return to the Edit Form screen.
- On the Edit Form screen, under Advanced Options > Alternate Form Creation Renderer, click Select Xsl file.
- 14. On the Select Xsl File screen, locate **createlUOptionsForm.xslt** and click **Select** to the right of its name. The selected file will be listed at the top of the page under Items to Attach.
- 15. Scroll to the bottom of the Select Xsl File screen and click **Continue** to return to the Edit Form screen.
- 16. To preview your modifications, click **Preview**. Verify the changes in the Theme menu. Then click **Return** to go back to the Edit Form screen.
- 17. Click **Save Changes** to save your modifications.
- 18. Open the Presentation Templates tool.
- 19. Edit the template that will use the Required Settings form.
- 20. Click **Continue** twice to get to Step 2of 4.
- 21. Click Edit next to the section name that will use the new form.
- 22. Using the Outline Options Form Type dropdown, select your new form to associate it with the template.
- 23. Click Finish.

# **VIII. TESTING YOUR TEMPLATE MODIFICATIONS**

Before deploying your modified template to a production site, spend some time testing it in the practice site. Create a presentation and fill out the form for each section, varying the number of pages in each. If you restricted the number of pages in each section, check to make sure your restrictions are enforced. If you modified the main menu link name or placeholder content for one or more sections, verify that these items are correct and render properly when creating or editing a section. Finally, preview your presentation to make sure all sections and pages render as expected. If additional refinements are needed, consult the relevant sections of this guide.

When you are satisfied with the version of the template in the practice site, you can export it (using the Export link on the Manage Presentations Templates page) and import it into your production site, as described in section IV of this guide.

# IX. FOR MORE INFORMATION

For more information or assistance with modifying the Presentation Maker template, contact:

Lynn Ward, Principal Systems Analyst, Academic and Faculty Services University Information Technology Services Phone: 317-278-5713 E-mail: leward@iupui.edu

#### Template Title: Template Description:

#### Section 1:

- Title:
- Instructions:
- Page Limit:
- Main Menu Link Name:
- Placeholder Content:

#### Section 2:

- Title:
- Instructions:
- Page Limit:
- Main Menu Link Name:
- Placeholder Content:

#### Section 3:

- Title:
- Instructions:
- Page Limit:
- Main Menu Link Name:
- Placeholder Content:

#### Section 4:

- Title:
- Instructions:
- Page Limit:
- Main Menu Link Name:
- Placeholder Content:

#### Section 5:

- Title:
- Instructions:
- Page Limit:
- Main Menu Link Name:
- Placeholder Content:

#### Section 6:

- Title:
- Instructions:
- Page Limit:
- Main Menu Link Name:
- Placeholder Content:

#### Section 7:

- Title:
- Instructions:
- Page Limit:
- Main Menu Link Name:
- Placeholder Content: