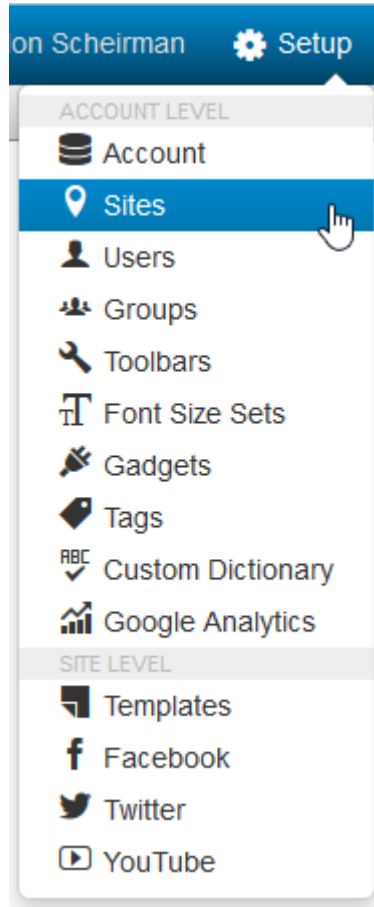


## How to Use Insights

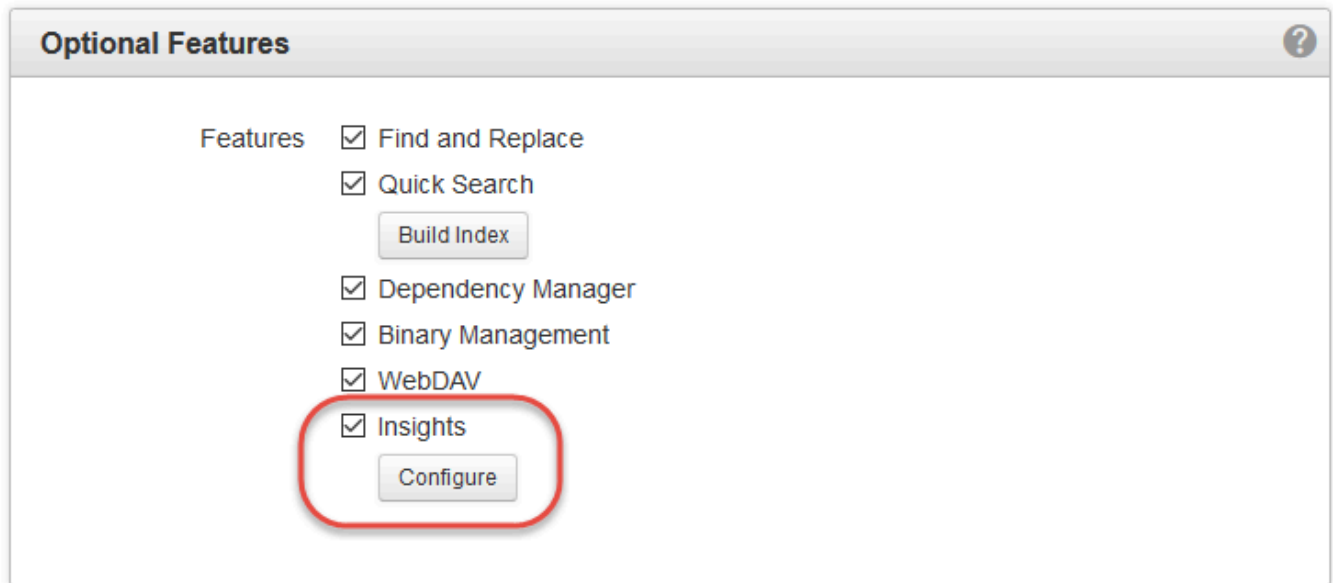
### Configuring Insights

Once Insights has been purchased, it must be turned on for the site or sites it is meant to scan. To set Insights up:

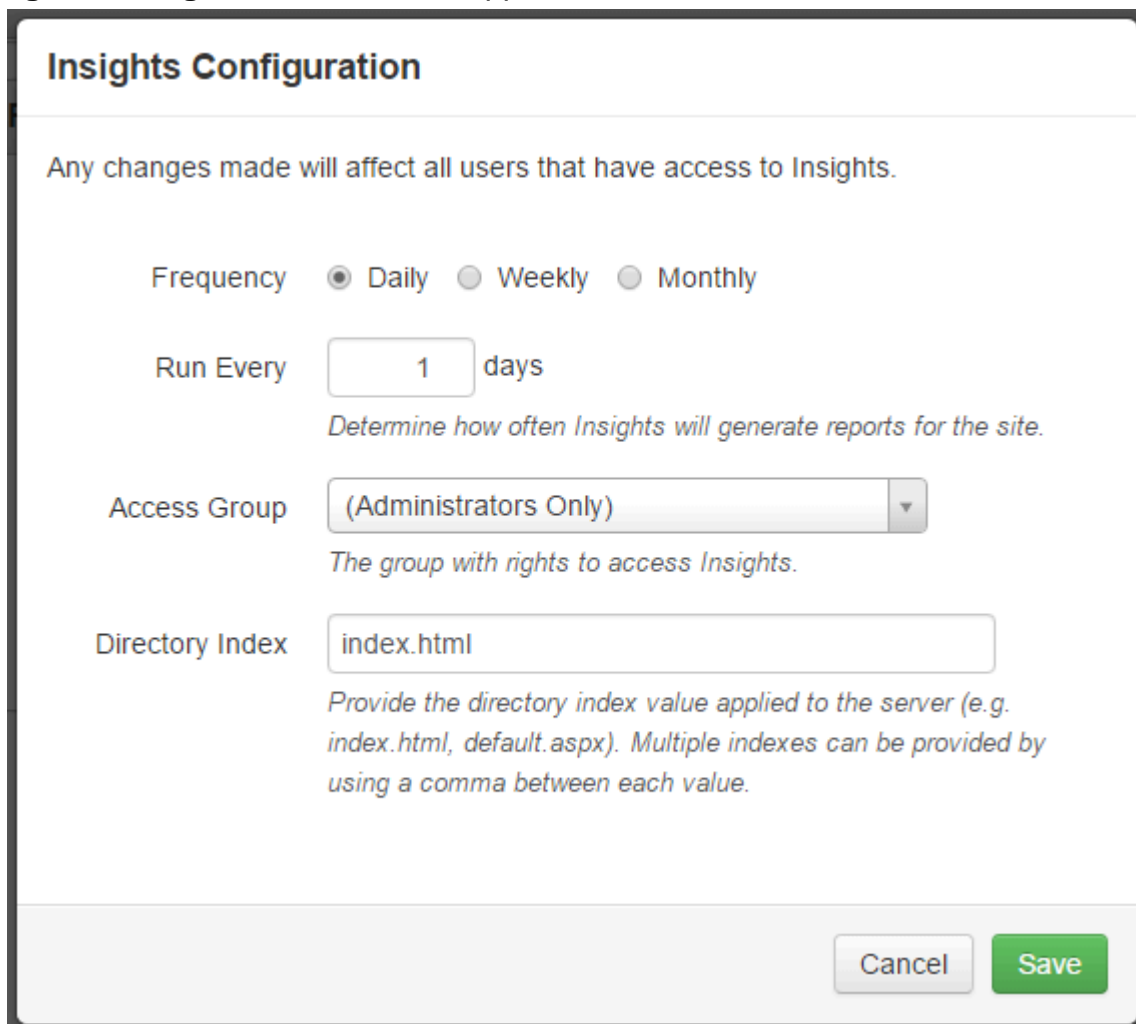
1. In the **Setup** menu, navigate to **Sites**.



2. Click on the name of the site you want to turn Insights on for.
3. Click **Optional Features** from the left-hand menu, or scroll down until you come to that window.
4. Check the box next to "Insights."



5. The **Insights Configuration** modal will appear.



The fields you can configure are:

- **Frequency:** How often you want Insights to scan your site.
- **Run Every:** If "Daily" or "Weekly" are selected for frequency, specify the interval at which you want Insights to scan. If "Monthly" is selected, specify a day of the month for the scan to run.
  - If you use a day of the month higher than the number of days in a specific month, (e.g. 31), then the scan will default to running on the last day of that month.
- **Access Group:** The group that can view the Insights module. This group will also receive email reports from Insights each time it scans the site.
- **Directory Index:** To scan properly, Insights needs to know what your index pages are called (e.g. index.html, default.aspx). Enter this value here to tell Insights what to add to a URL that ends with a /, such as `http://gallena.edu/academics/`. When browsers request these links, the server will return a page based on this setting's configuration (e.g., `http://gallena.edu/academics/index.html`). This is necessary for Insights to properly scan pages.

Common directory index values are `index.html`, `index.php`, or `default.aspx`. Because server configurations allow for multiple directory index values, Insights allows administrators to set a priority for those values by adding comma-separated values in the **Directory Index** field, which Insights will attempt to find in the order they are written.

For example, if Insights has `index.html, index.php` written in the **Directory Index** field, Insights will first search for files ending in `index.html`, and if it does not find `index.html` in a given directory, it will then search for `index.php`.

6. Click **Save** for your changes to take effect. Insights scans all sites between 7 PM and 2 AM Pacific Time, so if you have just configured your module you will not see any results from a scan until after that time. It will scan first that night, and then run on the interval you have specified. This first scan will be the most intensive, as it must fully index your entire site, and will take from hours up to a day to run.

If you are a self-hosted customer, you may need to open additional ports on your server to allow Insights to make outbound connections. Please coordinate with OmniUpdate staff or send in a support ticket for more information.

## How Insights Scans Pages

OU Insights automatically scans every production page managed by OU Campus. In addition, an optional file named `insights.txt` can be generated on the production server at the HTTP Root of the site. This file serves to supplement the list of scanned pages with other URLs that you may want scanned.

All pages that return a valid response from the server (e.g. an HTTP Status Code of 200) can be included. To add more pages to the list, edit `insights.txt` and add the full URL of each page that needs to be scanned. Save the file, and when Insights runs its next scan, the new files should appear in the reports. **Do not** rename or move `insights.txt`, as Insights will not be able to find the list of pages to scan otherwise.

In addition, URLs can be added to `insights.txt` to exclude them from the scan. To indicate a URL is to be removed, add a "-" before it. For example, this excludes the path to an individual page:

```
-https://domain.edu/path/to/page.html
```

The below will exclude everything in the folder (including all sub-folders):

```
-https://domain.edu/path/to/folder/
```

Folder exclusions must include a trailing slash at the end to indicate it is a folder.

When a page or folder is excluded, it will not be scanned by Insights even if other pages link to it.

### Example

Below is a sample of what insights.txt might contain:

```
-https://gallena.edu/_resources/  
-https://gallena.edu/_archive/  
-https://gallena.edu/biology/internal.html  
-https://gallena.edu/english/internal.html  
https://cfa-gallena.edu/calendar.html  
https://cfa-gallena.edu/contributors.html
```

The above entries results in the following:

- Because Insights is installed in gallena.edu, all pages under that domain are scanned with the exception of those in the `_resources` and `_archive` folder
- In addition, the `internal.html` pages in the `biology` and `English` folders are not scanned.
- The specified pages on the external domain `cfa-gallena.edu` are also scanned.

### Reporting

Insights scans your site according to four metrics: [SEO](#), [Accessibility](#), [Links](#), and [Spelling](#). You can also view [reports on individual pages](#) that combine these aspects. On the main page of Insights, you'll see "scores" for these four reports, as well as an overall site score. The higher the number, the better the score.

Viewing each report shows you the full results of that report; e.g., opening the **Spelling** report will show you all misspelled words in the site. These results will also indicate to you which pages need to be edited to solve the issues.

An overview report with the site score, as well as four report scores, will be emailed to everyone in the Insights access group each time a scan is run.