Content Publisher User Guide

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Overview of the Content Management System

Covisint's Portal provides Content Management System functionality in two major areas: **document management** and **publishing**. Document management is provided through Covisint's Documents and Media portlet. This portlet provides intuitive management of your organization's files and images.

Content that is stored in the Documents and Media portlet are made available to portal users when Content Managers publish the content to the portal. Content is published to a portal inside portlets.

Anatomy of a Portal Page

The following is the anatomy of a portal page. A portal page is made up of one or many portlets. Within the portlet is content, called web content. Within the web content could be links to documents and images stored in the Documents and Media library.

This example uses a page from the Covisint Support portal. While your page may look different, the structure of your page will be the same.
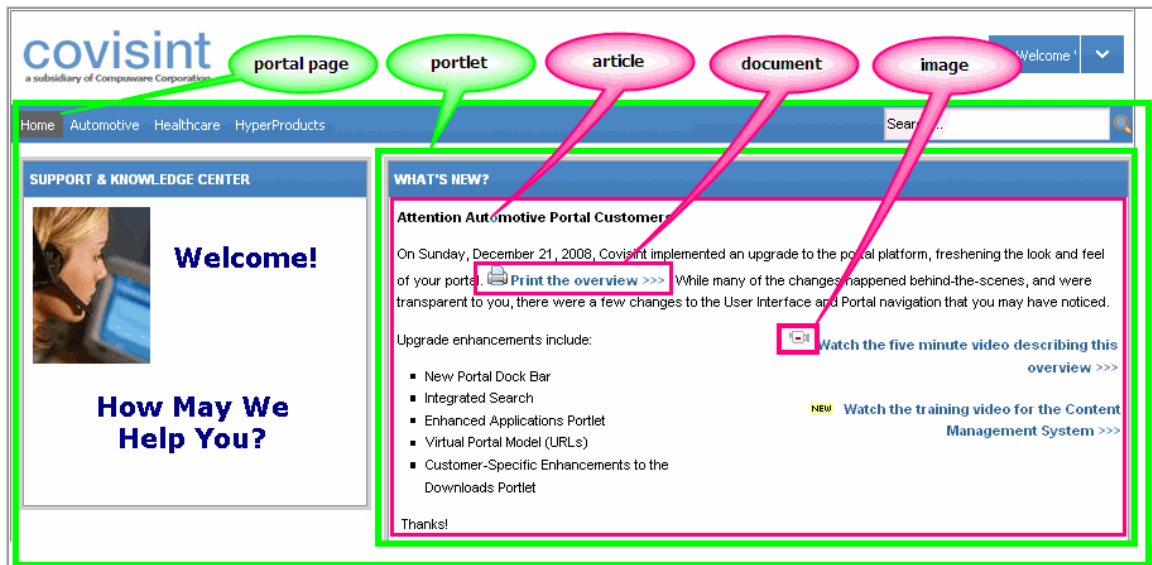
Using this example, there is a page on the Covisint portal called the "Home" page . On this page is a portlet called "What's New?". By default, pages and portlets are managed by your Portal Content Administrator.

Within the portlet is content, referred to as a web content called "Attention Auto Portal Customers". This web content contains a link to a document called "print the overview". This document is stored in the Documents and Media library. The web content also displays an image of a video camera. The image is stored in the Documents and Media library. By default, web content and the documents and images within them, are managed by Content Managers.

To summarize, files that are stored in the Documents and Media Library are made available to portal users when Content Managers publish the content to the portal. Web content is published to a portal page inside portlets.

The permission to view any of these items is configurable, as each may have a different degree of specificity.

It is highly recommended that you review the section entitled Permissions Overview before beginning to work in the Content Management System.

Each Portal is slightly different. Portal components may appear slightly different, but functionality will be the same unless noted.

Toggling Edit Controls

Edit controls allow authorized users to access the icons required to manage web content.
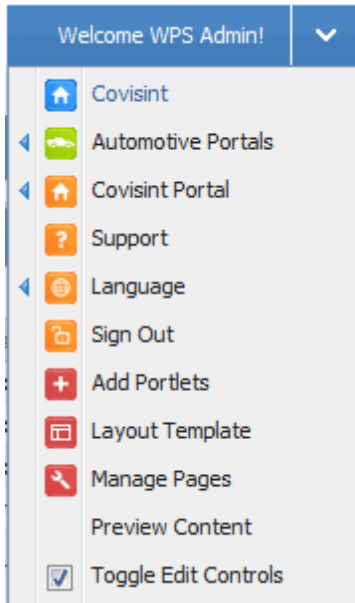
Navigate to the top right corner of the main toolbar, and click the **user name**. When **Toggle Edit Controls** is checked, edit controls are turned on. Click again to turn off edit controls.

Getting Started Checklist

The following checklist is designed to help get you started using Covisint's Content Management system.

All tasks described in this help selection are role-based. If you are not able to perform a task, contact your system administrator to have the proper role(s) assigned to your profile. Tasks listed below are in the order in which they most commonly are performed.

| TASK:	REVIEW THE TOPIC:
Identify the Documents and Media Library, and the Web Content Portlet.	Accessing the Portal Content Management System
Review permission requirements on Documents, Articles, and Portlets. It is highly recommended that you review the Permissions Overview section before beginning work in the Content Management System.	Permissions Overview Permission Error Types
Identify the process of managing content to the portal	Web Content Overview Editing Web Content
Create hyperlinks to documents on your portal page	Creating a hyperlink to existing document
Upload new versions of existing documents	Uploading a new version of a document

Accessing the Portal Content Management System

After logging in to your Portal, click the **Content Management** Link in the menu options, usually placed on the left side of the screen to launch your Content Management System (CMS).
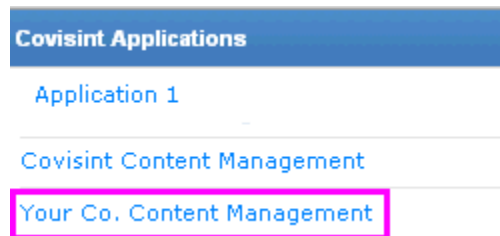
Your Content Management page is displayed. This page generally contains the following portlets:
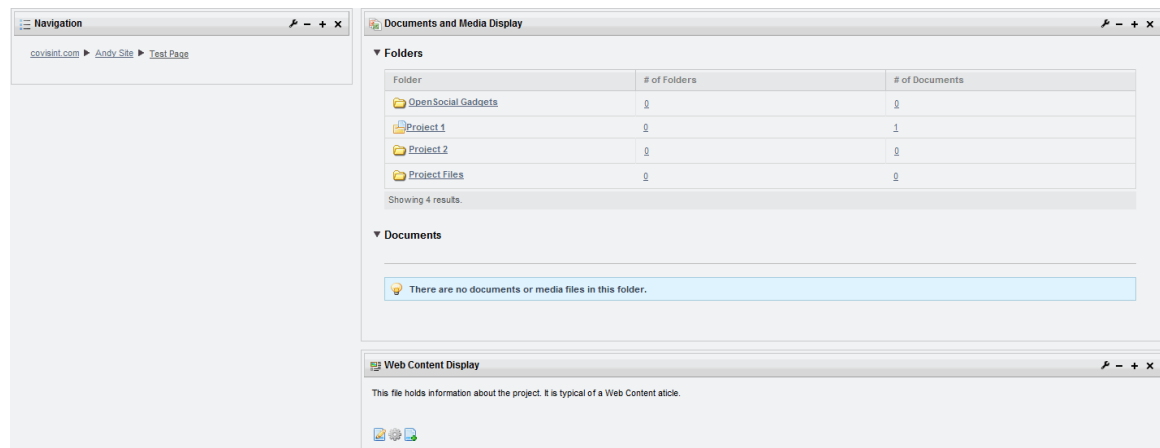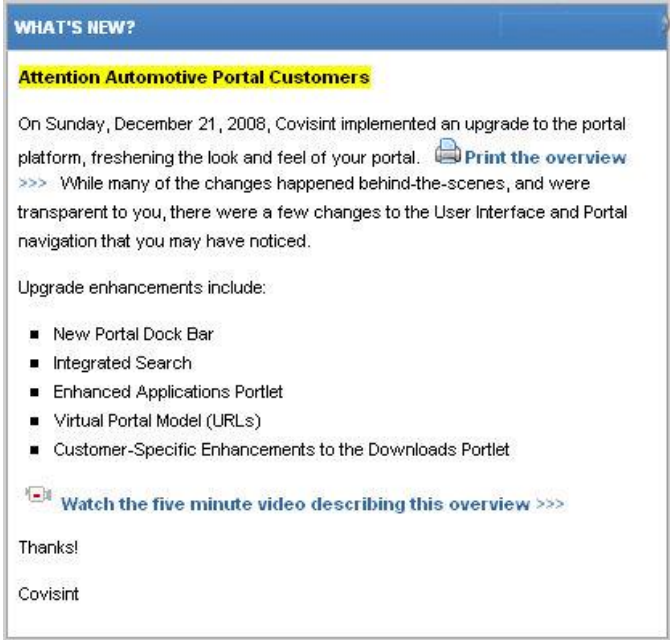

- Document and Media Library

- Web Content

> Tasks are role-based. If you do not have access to perform some of the tasks in this support material, you have most likely not been given the role to do so. Check with your Content Management Administrator for details.

Web Content Overview

Web content (also referred to as an article) is the name of the content held within a portlet. The following screen shot is called the "What's New" Portlet. Within the portlet is web content, titled "Attention Automotive Portal Customers." Within this web content, is a link ("print the overview") to a document that is stored in the Document Library. Review the section entitled Anatomy of a Portal Page for further details.

WHAT'S NEW?

Attention Automotive Portal Customers

On Sunday, December 21, 2008, Covisint implemented an upgrade to the portal platform, freshening the look and feel of your portal. 🖨 **Print the overview**
>>> While many of the changes happened behind-the-scenes, and were transparent to you, there were a few changes to the User Interface and Portal navigation that you may have noticed.

Upgrade enhancements include:

- New Portal Dock Bar
- Integrated Search
- Enhanced Applications Portlet
- Virtual Portal Model (URLs)
- Customer-Specific Enhancements to the Downloads Portlet

▶ **Watch the five minute video describing this overview** >>>

Thanks!

Covisint

The ability to view the portlet, web content, and document is controlled by the permissions set on each item.

It is imperative that you review the section entitled Permissions Overview before proceeding further.

Typically, Content Publishers generally manage the documents and web content, while the Portal Content Administrators manage portlets and portal pages.

Important Notes When Using the Editor

✅ Use Internet Explorer (IE) browser when using the WYSIWYG Editor. (IE is the only browser supported by Covisint).

- When attempting to paste text using Firefox, Chrome, or other browser, the system will not clean up the code and will likely render unsatisfactory results.

✅ When using the WYSIWYG editor, the portal's global stylesheet overrides the classes you may have added to your content.

✅ Warning: Only edit one article of web content at a time.

Do not attempt to simultaneously edit multiple web content articles in multiple tabs in your browser.

Doing so will cause saving / approving to occur on all open articles, not limited to the selected article.

Adding an Article

The following section describes the steps required to create your own content for display in a portlet. This can be accomplished by Adding an Article.

1. Navigate to the folder within the Web Content Portlet in which you wish to add an article.
2. Click **Add.** The WYSIWYG editor is displayed.
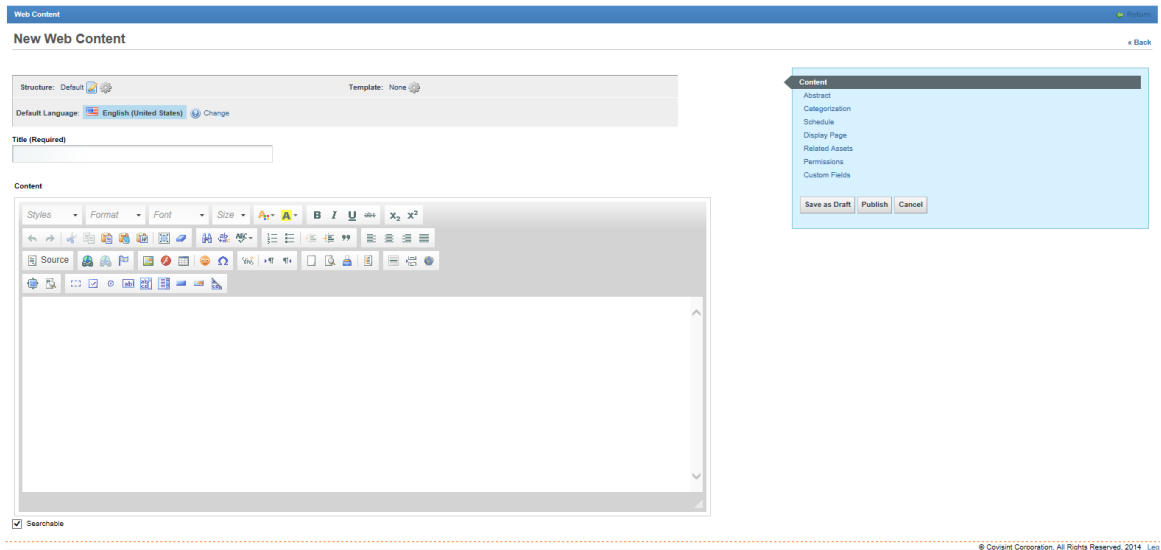
3. Key in the name of the article in the **Title** field.
4. Key in the body of the article using the WYSIWYG editor.
5. Optionally, add images and links to other documents.
7. Perform one or more of the following:

If you wish to...	Then...
publish your content to the portal	a. Click **Publish**.
save changes to the content without publishing to the portlet	a. Click **Save**. The screen refreshes and returns to the full page view.

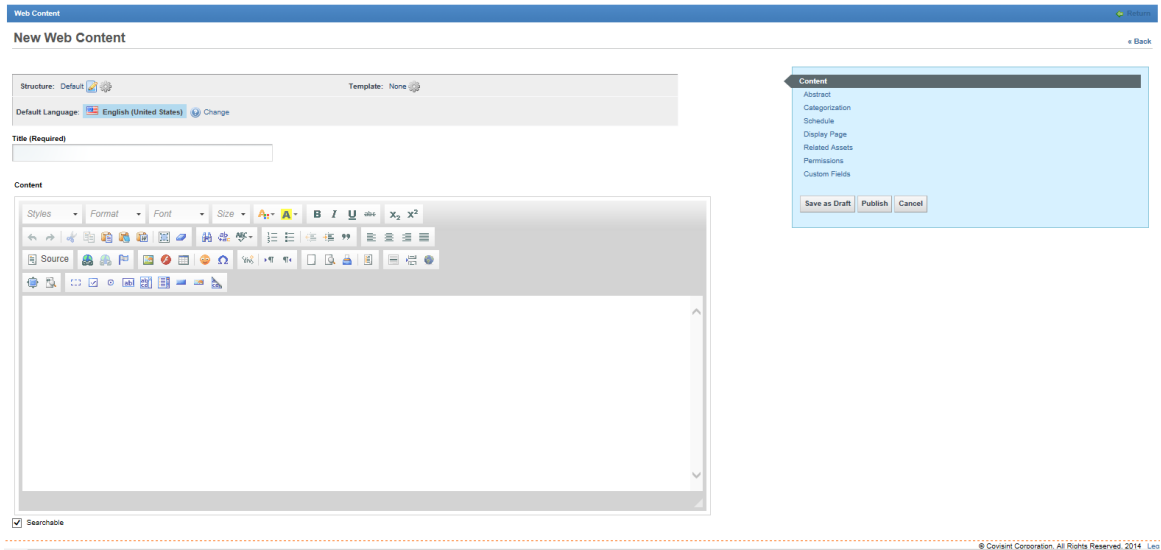**RESULT:**

You have successfully added an article.

Adding Hyperlinks

Hyperlinks can link to content inside or outside the Portal.

1. Highlight the link text.

2. In the toolbar, click **Link** .

3. Select the link type.
4. Enter the target URL.
5. Click **OK**.

RESULTS

You have successfully added a hyperlink.

WYSIWYG (Full-Feature) Editor Overview

The WYSIWYG Editor is the full-featured editor. It enables you to edit content on your portal page in a separate editor window. In addition to standard editing options, the WYSIWYG Editor also includes:

- Spell Check As You Type (SCAYT): allows you to control the spelling of your document at the same time that you are writing it. SCAYT checks the text immediately after you write it and when it finds an error it marks it with a red wavy line underneath the misspelled word.
- Form Elements: provides form elements (e.g., form, checkbox, radio, etc.) to add in the content.
- New Page: clears the editing area and creates a new page.
- Preview: shows a preview of the document as it will be displayed to end users or printed.
- Print: activates the printing function. A standard operating system printing pop-up window will appear where you will be able to choose the printer as well as all relevant options.
- Templates: provide a dialog to offer predefined content templates - with page layout, text formatting and styles. It includes several sample templates or you may upload your own favorite templates.
- Find / Replace: allows you to quickly search the text as well as replace words inside it. Common options available for matching: case, whole word, cyclic.
- Select All: allows you to select entire contents of the document.

Note: Certain features such as the form elements, highlighted below, are only available in the WYSIWYG Editor.

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Inline Editor Overview

The inline editor allows you to edit text directly in the page without requiring you to go to a separate page. It makes the interaction more direct and intuitive as you can edit the text in the same place where it is shown. The user simply clicks on the content in a portlet to display the Inline Editor, without going to a separate window.
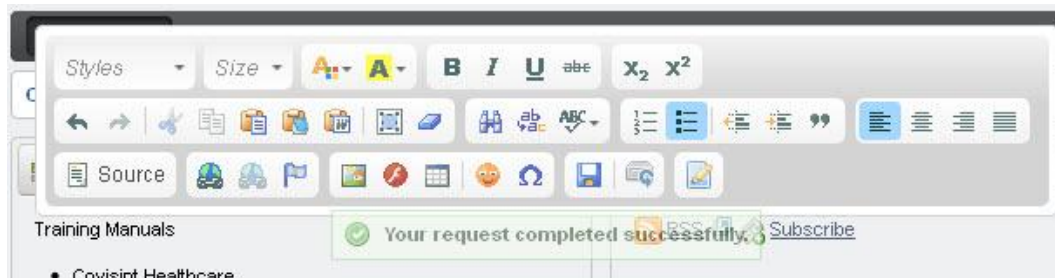
- User can either save the edited version by clicking the **Save** button or remove the edited version by clicking the **Cancel** button.
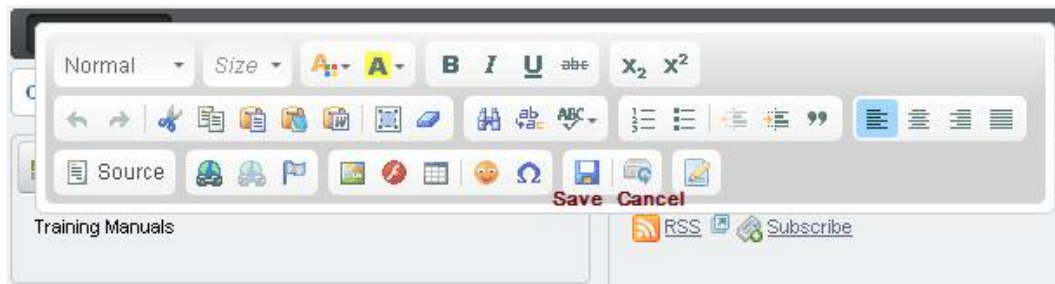
- Enabling workflow will disable inline editor

- Unchecking the "Edit Controls" will also disable inline editor.
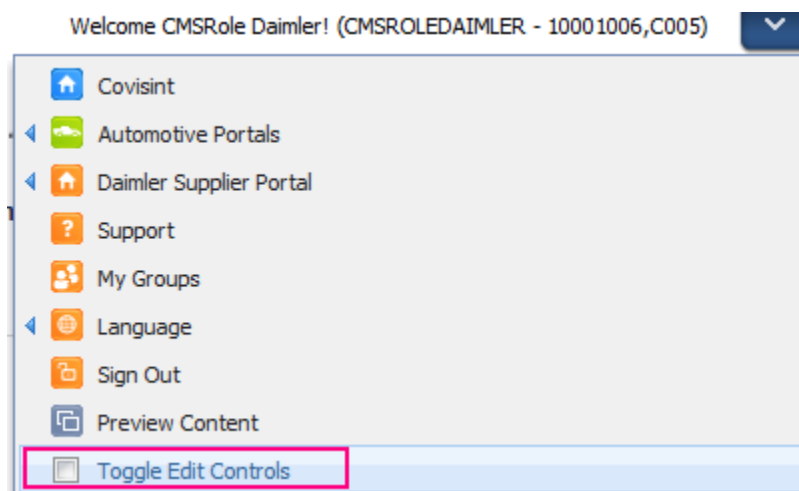

- When saving the edited version in the Inline mode a confirmation message displays.

- Each time the edited content is saved in the inline mode a new version is created.

- Saving in inline mode is equivalent to being published in full featured mode thereby displaying the changes immediately.

- In the Message Board and Wiki portlets, the editor feature is enabled only when the format is kept "HTML." In the Blog portlet, contents can be edited in inline mode.

- Clicking the **Edit** button on the Inline Editor will take the user to the WYSIWYG Editor.
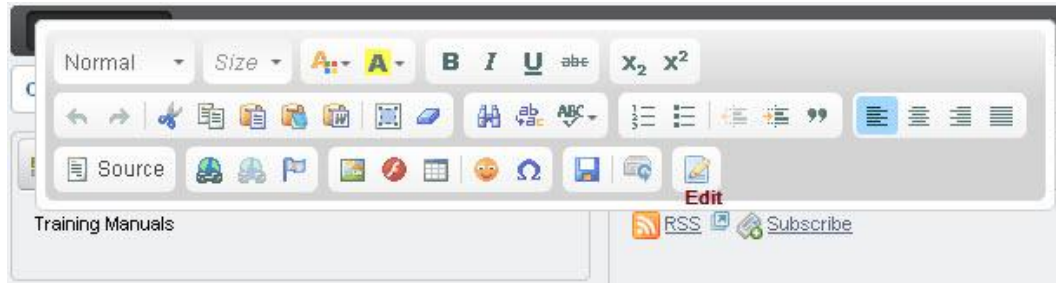
Editing Existing Web Content Articles using the WYSIWYG Editor

WYSIWYG, an acronym for What You See Is What You Get, is used in CMS to describe a system in which the content displayed during editing appears very similar to the final output when displayed on the portal page. The editor is displayed when you create or edit an article.

Users (with appropriate access) are able to edit web content by completing the following steps.

**Note: Only edit one article of web content at a time.**

Do not attempt to simultaneously edit multiple web content articles in multiple tabs in your browser.

Doing so may cause saving / approving to occur on all open articles, not limited to the selected article.

1. Turn on Edit Controls.
2. Click on the to the web content article you wish to edit. The editor toolbar is displayed.
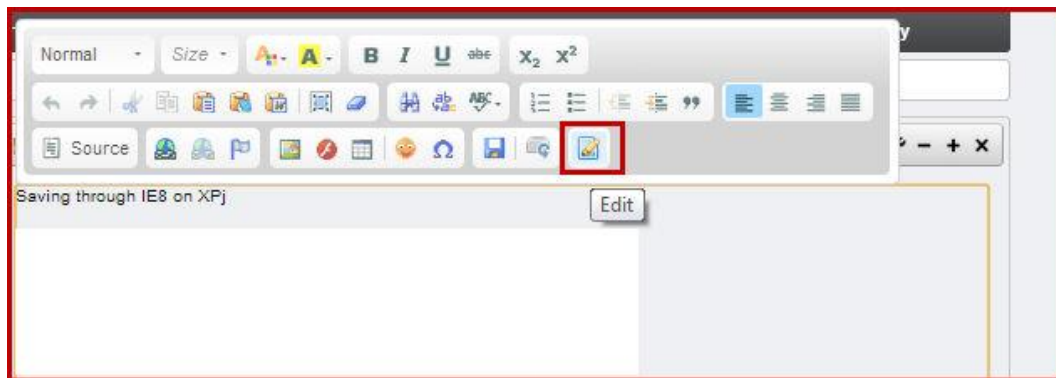
3. Click ![edit icon] (edit icon). The currently published version of the article is displayed in the built-in editor.
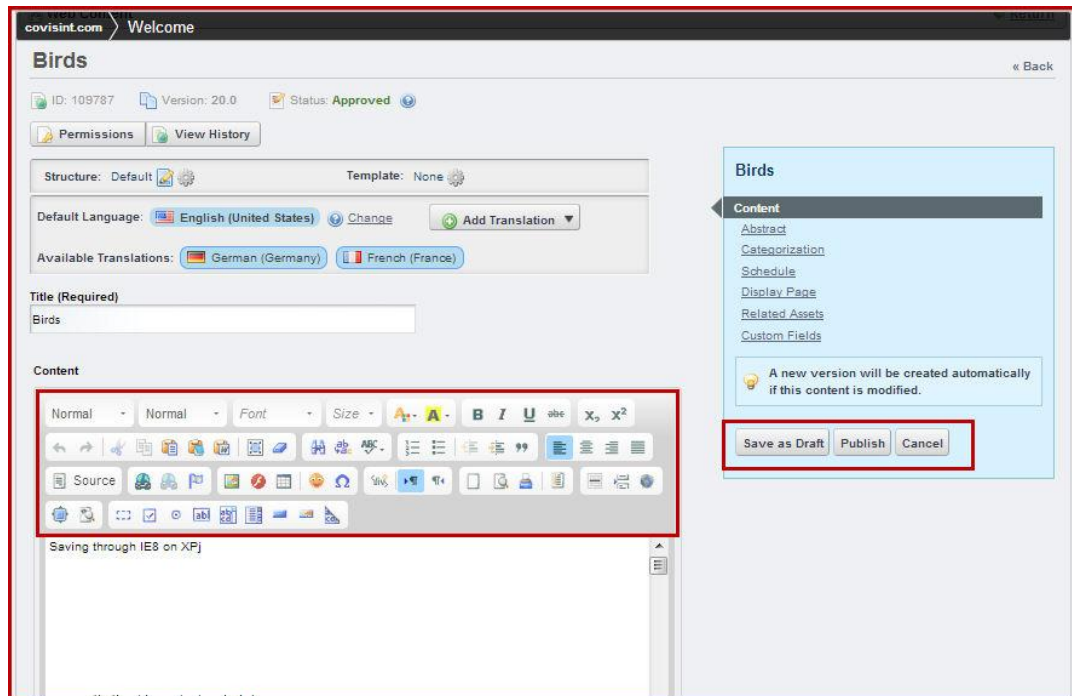
Important Notes about the WYSIWYG Editor:

- In this example, the approved version 20.0 is displayed. This is the version that is currently published on the portal.
- Optionally, view previous versions of the web content article by clicking **View History**.
- Edit the article using the functions available in the built-in editor. The functions you will use most often include:

  - create a link to a document stored in Documents and Media Library, or another website.

  - select an image to display (stored in Documents and Media Library)
- If you prefer to work in HTML code, click **Source**.
- Generally, toolbars in the editor closely match toolbars in common word processing applications. By hovering the mouse over an icon in the toolbar, a description of that item is displayed. Users also have the option to click the source button and create pages via HTML code if that is preferred.

4. Edit the web content article as desired. Optionally, perform one or more of the following:

- add a link to a document stored in the Documents and Media Library

- add a link to a document (not yet stored in the Documents and Media Library)

- display an image

> If you added a new document to this web content article and uploaded it to Documents and Media Library, you may need to modify user permissions on the document after saving your changes.

5. Optionally, perform one of the following:

IF YOU WISH TO...	THEN:
Publish the content to the portal	Click **Publish**. The edit screen closes, and the page on which the content was edited is displayed.
Save content as a draft and return without publishing the content	a. Click **Save as Draft.** b. Click **Back (at the top right corner of screen)**. The draft version is saved.
Preview web content before publishing	Click **View.**
Download web content as an XML file	Click **Download**.
Return to portal page and cancel edits	Click **Cancel**. Any work performed since the last time you clicked save is cancelled.
Schedule the publish date (so that the approved content will be displayed on the portal at a future date/time)	a. Click **Schedule**. b. Set the Display Date (this is the date the approved content will appear on the portal).

c. Click **Publish**.

Generally, toolbars in the editor closely match toolbars in common word processing applications. By hovering the mouse over an icon in the toolbar, a description of that item is displayed. Users also have the option to **click the source button** and create pages via HTML code if that is preferred.

How do I type in SOURCE code?

```
<!-- begin Show/Hide script --><SCRIPT LANGUAGE="javascript"> <!--
function doSection(divid) { var ThisAnswer =
document.getElementById(divid); if ( ThisAnswer.style.display
== 'none' ) { if (document.all) { ThisAnswer.style.display
= 'block'; } else { ThisAnswer.style.display = ''; } } else {
ThisAnswer.style.display = 'none'; } } --> </SCRIPT><!-- end
Show/Hide script --><script language="JavaScript"> <!-- var
languageHidden = true; //Set a java value to a JavaScript value
var willReturnToMain = false; function menuLanguage(locX, locY) {
var subMenu = getElt("langSub1"); if (is.nav) { (subMenu, locX+8,
locY+4); setEltTop (subMenu,locY); setEltLeft (subMenu,locX+8); }
setEltVisibility(subMenu,
(languageHidden) ? "visible" : "hidden"); languageHidden = !
languageHidden; } function confirmLanguageSwitch() { if
(willReturnToMain) { var subMenu = getElt("langSub1");
setEltVisibility(subMenu, "hidden"); languageHidden = true; return
confirm("Changing the language returns you to the top level of the
tab you are viewing."); } return true; } function
confirmPreviewSwitch() { if (willReturnToMain) { return confirm
("Changing the staging/production status returns you to the top
```

▶ Abstract

Save   Save and Continue   Cancel

The WYSIWYG editor allows you to create links or present images that are stored in the Documents and Media library. You are also able to upload new content to these document management portlets from the editor.
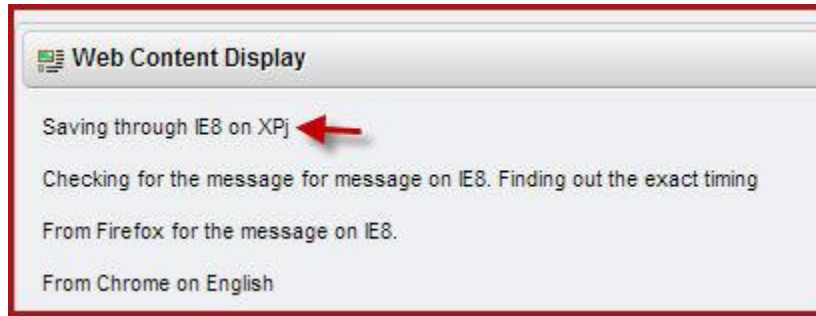
RESULTS

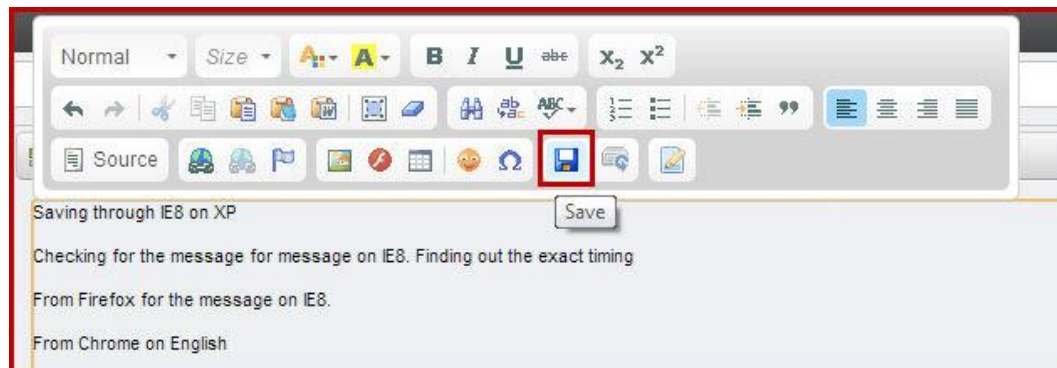You have successfully edited a web content article.

Using Inline Editor

The Inline Editor enables you to edit content directly on your portal page, rather than in a separate editor window.

1. Turn on edit controls.

3. Click on the text you wish to edit. (This example will edit the term XPj.) The inline editor toolbar displays on the screen.

4. Edit the text as desired.

5. Click **Save** in the editor toolbar. A confirmation dialog box is displayed.

6. Click **OK** to confirm edit. A new version of this content is saved in the system, and your changes are displayed.

RESULTS

You have successfully used the inline editor to edit content.

Web Content Administration Portlet Overview

The Web Content Administration portlet is a centralized repository for all content on your portal. Content in this sense could be a website, web pages, or portions of a web page. Sophisticated features assign a unique URL to each piece of web content, auto-saves previous versions,and enables users to schedule when content is published or removed.

Content Administrators manage portal content articles through the Web Content Administration portlet. From this view, Administrators are able to perform the following tasks on a web content article:

o   Delete
o   Edit
o   Expire
o   Modify permissions (who can see the content)
o   Preview the content (prior to publishing)
o   Reinstate previous versions
o   Schedule date for publishing / removing content
o   View previous versions
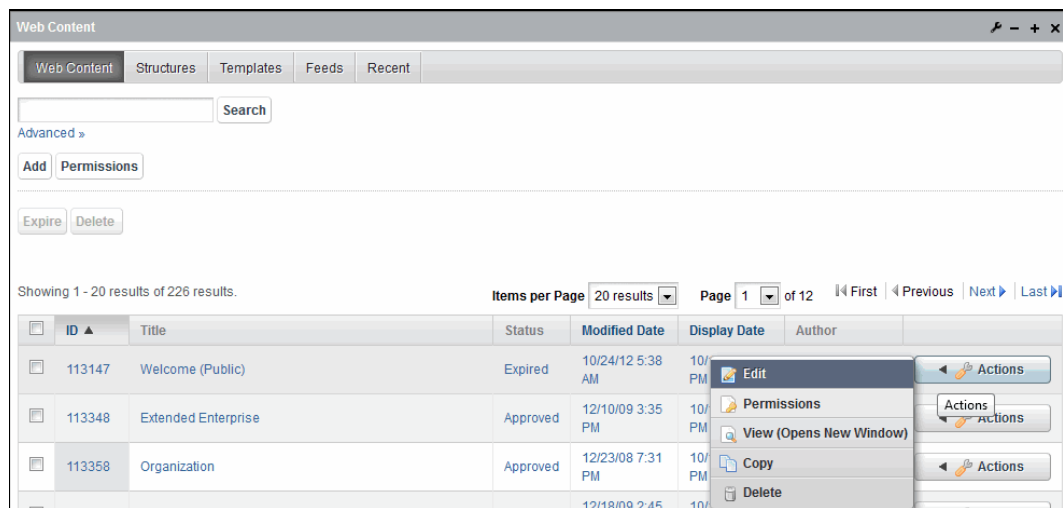
As shown in this example, the system auto-assigned an ID number (36754) to this web content when it was created.

Editing Web Content with Preview

Using Preview functionality as described in this topic is the preferred and recommended approach to editing web content.

The CMS system enables the Content Publisher to edited web content in a "preview" mode. Content Publishers are able to modify web content in real-time on the live production portal, or they may choose to do so in a "behind-the-scenes" view, using the Preview functionality, as described below.

Warning: Only edit one article of web content at a time.

Do not attempt to simultaneously edit multiple web content articles in multiple tabs in your browser.

If you edit multiple articles in browser tabs, when you save or approve one of the articles, the action may be applied to all the articles.

1. Click User name and select **Preview Content** to enable Preview.
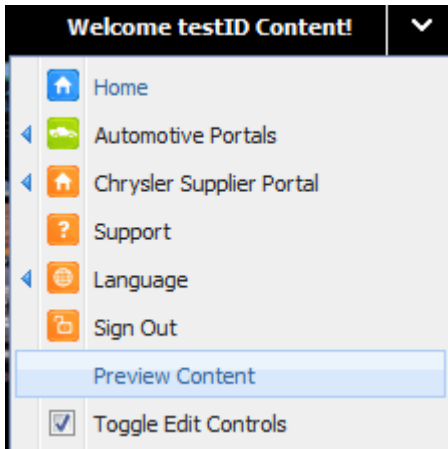
1. Navigate to the web content you wish to edit.

2. Click ✎ (edit icon). The most current version of the article is displayed in the built-in editor. (If you do not see the edit icon, enable the toggle edit controls in the CMS drop down menu. Refer to the section entitled Toggle Edit Controls for further details. If edit controls are enabled, and you still do not see the edit icon, then you do not have permission to edit this web content).
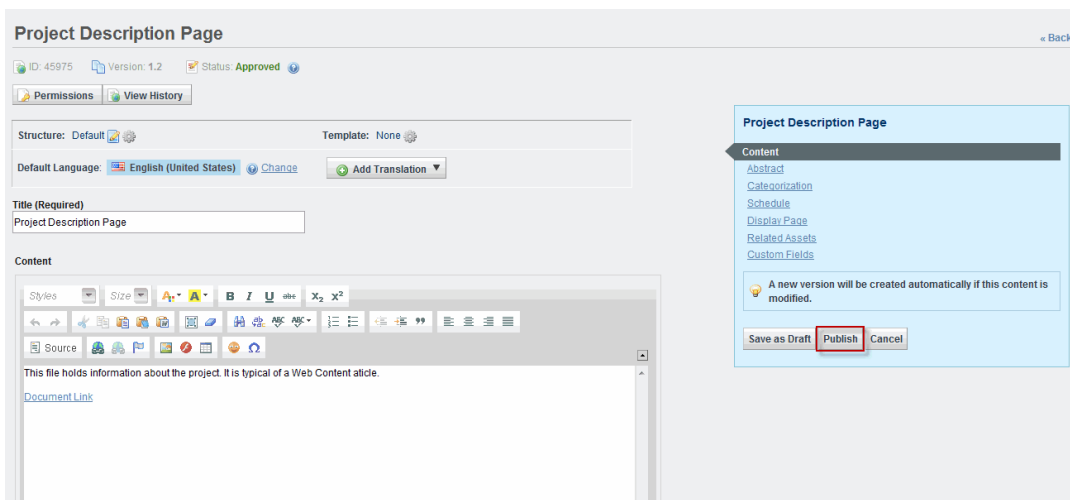
Edit the article using the functions available in the built-in editor. The functions you will use most often include:

🌐 - create a link to a document stored in Documents and Media Library, or another website.

🖼 - select an image to display (stored in Documents and Media Library)

The user can select any existing page which creates a pointer to that particular page.

If you prefer to work in HTML code, click **Source**.

Generally, toolbars in the editor closely match toolbars in common word processing applications. By hovering the mouse over an icon in the toolbar, a description of that item is displayed. Users also have the option to click the source button and create pages via HTML code if that is preferred.

4. Edit the article as desired. Optionally, perform one or more of the following:
    o **add a link to a document stored in the Documents and Media library**
    o **add a link to a document (not yet stored in the Documents and Media library)**
    o **display an image stored in the Documents and Media library**
    o **display an image (not yet stored in the Documents and Media library)**

5. Click Save as Draft..
6. Click **Back**. The page is displayed in preview mode.

7. After previewing the content, click

8. Perform one or more of the following:

IF YOU WISH TO....	THEN:
Approve and publish the content	a. Click **Publish**. The screen refreshes, and a confirmation message is displayed. b. Proceed to step 9.
Save content as a draft and return without publishing the content	a. Click Save as Draft. b. Click **Back** (at the top right corner of screen). The draft version is saved. b. Proceed to step 9.
Edit the previewed content	Repeat steps 3 - 7
Schedule the publish date (so that the approved content will be displayed on the portal at a future date/time)	a. Click **Schedule**. b. Set the Display Date (this is the date the published content will appear on the portal)

d. Scroll to bottom of screen and click **Publish.** (The content must be in "approved" state in order for it to be displayed on the date selected).

e. Proceed to step 9.

9. When ready, click **Publish** to publish the content to the portal.

RESULT:

You have successfully previewed an article before publishing, or edited Web Content in Preview mode.

Editing Web Content without Preview

Also known as Editing Portlet Content. Content Publishers are able to edit web content without previewing, directly from the portal. Edits are published immediately to the production portal upon clicking Publish. The preferred and recommended approach to editing web content articles is by using Preview functionality as described in the section entitled Editing an Article with Preview.

Warning: Only edit one article of web content at a time.

Do not attempt to simultaneously edit multiple web content articles in multiple tabs in your browser.

If you edit multiple articles in browser tabs, when you save or approve one of the articles, the action may be applied to all the articles.

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1. Navigate to the portlet in which the content you wish to edit is displayed.
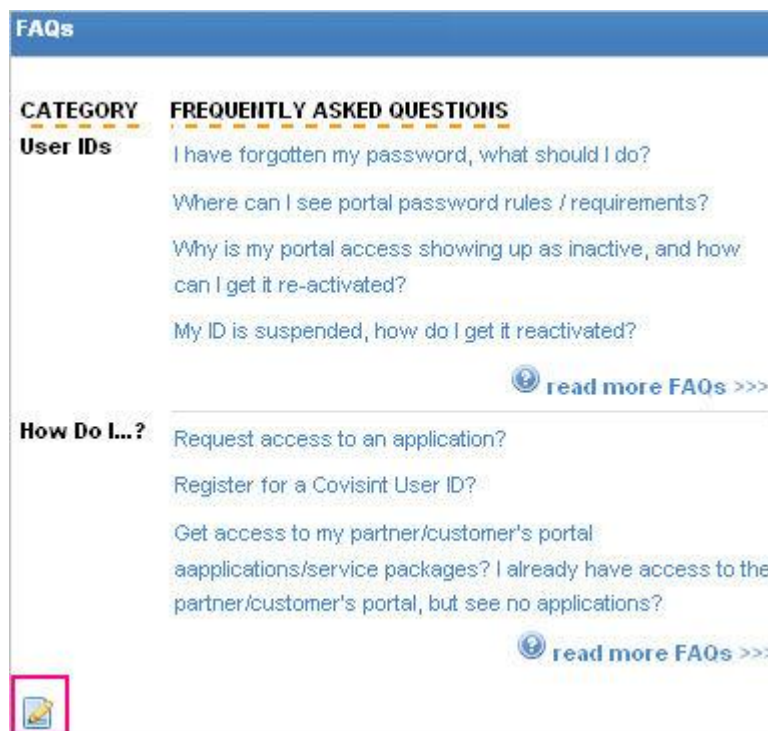
2. Click (edit icon). The currently **published** version of the article is displayed in the built-in editor. There may be more recent versions of the article that have not yet been published (if in Draft state or if publication is scheduled for a later date). Use the View History menu to validate that you are editing the intended version. (If you do not see the edit icon, enable the toggle edit controls in the CMS drop down menu. Refer to the section entitled Toggle Edit Controls for further details. If edit controls are enabled, and you still do not see the edit icon, then you do not have permission to edit this article).

The current/published version is that which is displayed in the built-in editor. There may be more recent versions of the article that have not yet been published. Use the View History menu to validate that you are editing the intended version.
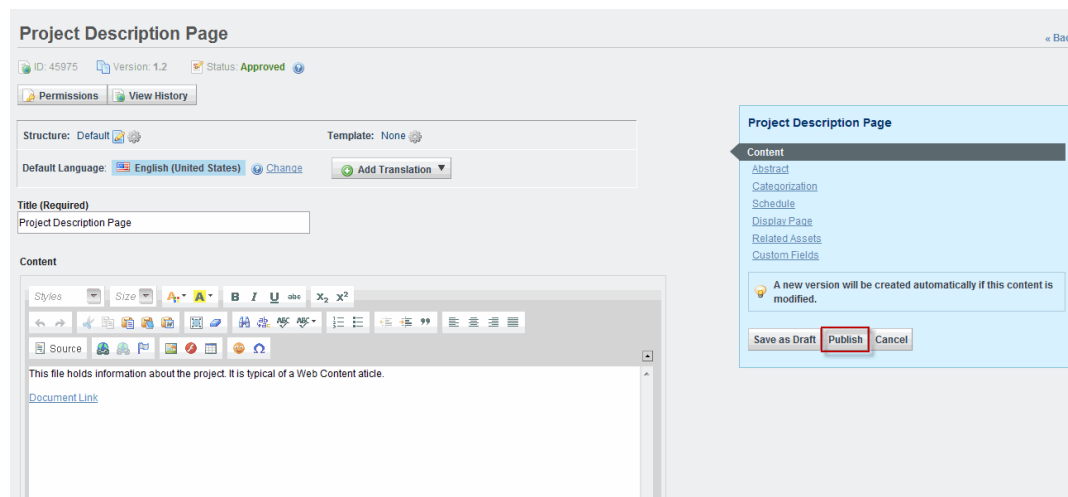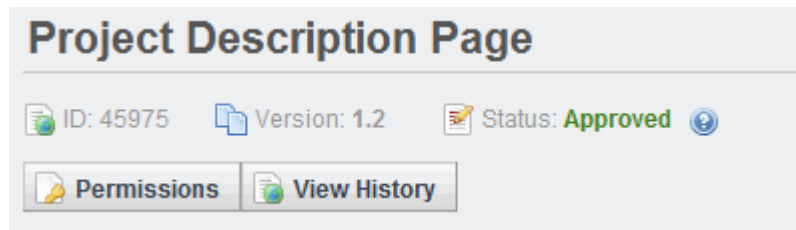
Edit the article using the functions available in the built-in editor. The functions you will use most often include:

- create a link to a document stored in Documents and Media library, or another website.

- select an image to display (stored in the Documents and Media library)

If you prefer to work in HTML code, click **Source**.

Generally, toolbars in the editor closely match toolbars in common word processing applications. By hovering the mouse over an icon in the toolbar, a description of that item is displayed. Users also have the option to click the source button and create pages via HTML code if that is preferred.

3. Edit the article as desired. Optionally, perform one or more of the following:
    - **add a link to a document stored in the Documents and Media library**
    - **add a link to a document (not yet stored in the Documents and Media library)**
    - **display an image stored in the Documents and Media library**
    - **display an image (not yet stored in the Documents and Media library)**

4. Perform one of the following:

IF YOU WISH TO...	THEN:
Approve and publish the content	a. Click Save as Draft. b. Click **Publish**. The screen refreshes, and a confirmation message is displayed. c. Click **Back.** The new version of the article is created and displayed on the portal.
Save content as a draft and return without publishing the content	a. Click Save as Draft. b. Click **Back**. The draft version is saved.

RESULTS
You have successfully edited an article.

Deleting a Web Content Article

1. Access the Web Content Administration Portlet.

2. Navigate to the web content article for which you wish to delete.
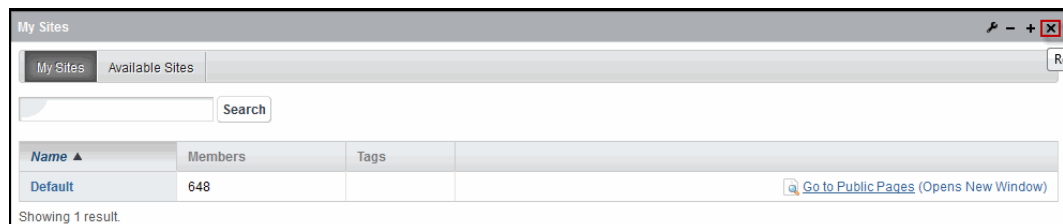
3. Click **Actions**.

4. Click **Delete**..

5. Click **OK** to confirm deletion. If this article was displayed in a portlet, the portlet will now display an error message until the portlet is removed by the administrator.

<div style="background-color:green; color:white; padding:2px;">RESULTS</div>

You have successfully deleted an article.

Learning about Web Content Article Properties

Whether you are creating a new web content article, or editing an existing web content article, properties of the web content article can be configured at any time.
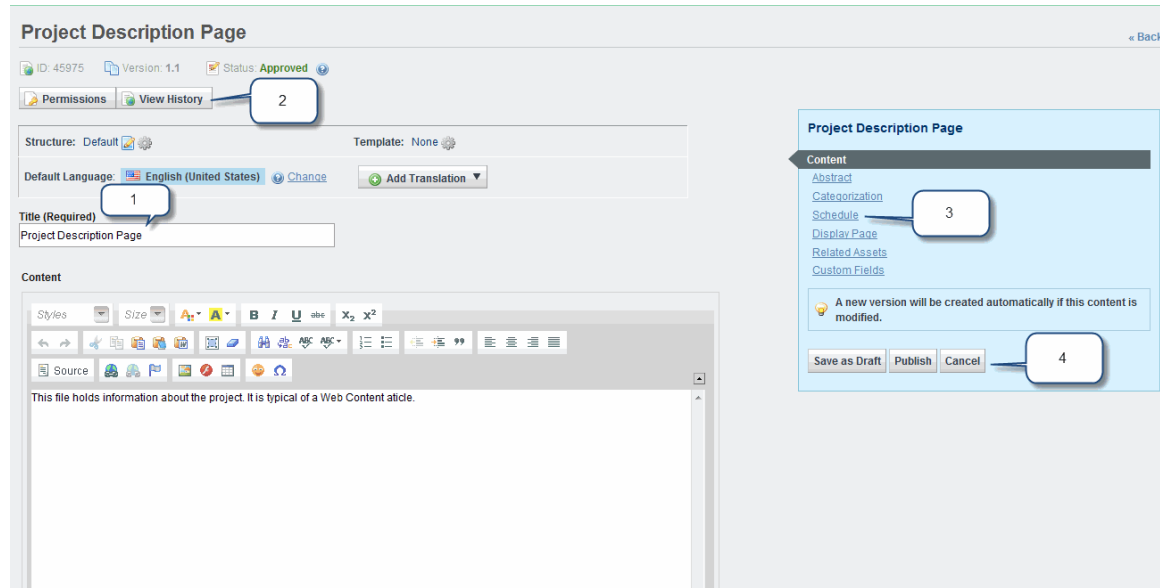
The following is a description of web content article properties most often used in content publishing.

ITEM:	NAME:	DESCRIPTION
1.	File Name	The name of the web content article as stored in the system. This name / name field is only visible to other Content Administrators.
2.	Version	Identifies the version number of the web content article.
3.	Schedule	When desired, set a display date and an expiration date. If you set a display date, this is the date when your content will be displayed on the portal provided it has been published. If you set an expiration date, this is the date your content will be expired from the portal page, but will remain stored in the system (available only to Content Administrators).
4.	Publishing Options	*Save as Draft* - Enables user to save changes, and closes the editor. Publish - the final step in publishing content on the portal. Once content is final, click Publish to display it in the portlet in which it was selected. *Cancel* - Cancels all edits that have occurred since the last save, and closes the editor.

Pasting Content into the Editor

When pasting content into an article in the WYSIWYG Editor, use either the CTRL + V command, or right-click your mouse and then click **paste** from the list of options. If you receive a message indicating that you are not able to use the right-click method, then you must change your browser security setting. By default, Internet Explorer browser's security restricts a user from pasting content copied to the clipboard directly into the editor. *Why is only Internet Explorer specified here?*

Complete the following steps to modify Internet Explorer browser security setting.
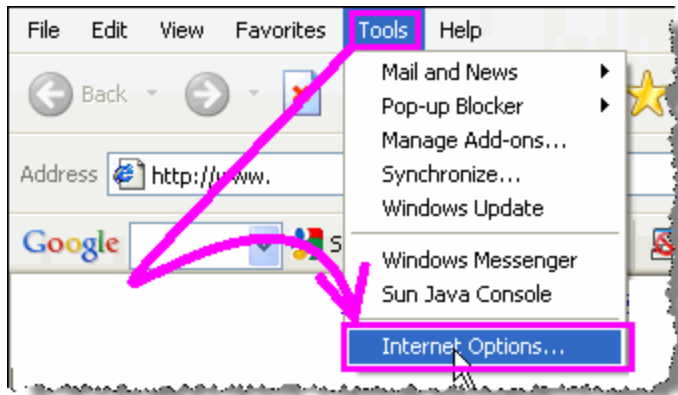
1. From Internet Explorer Browser toolbar, click **Tools**.

2. Click **Internet Options...** The Internet Options pop up box is displayed.

3. Click **Security** tab.

4. Click **Custom Level...** button. The Security Settings pop up window is displayed.
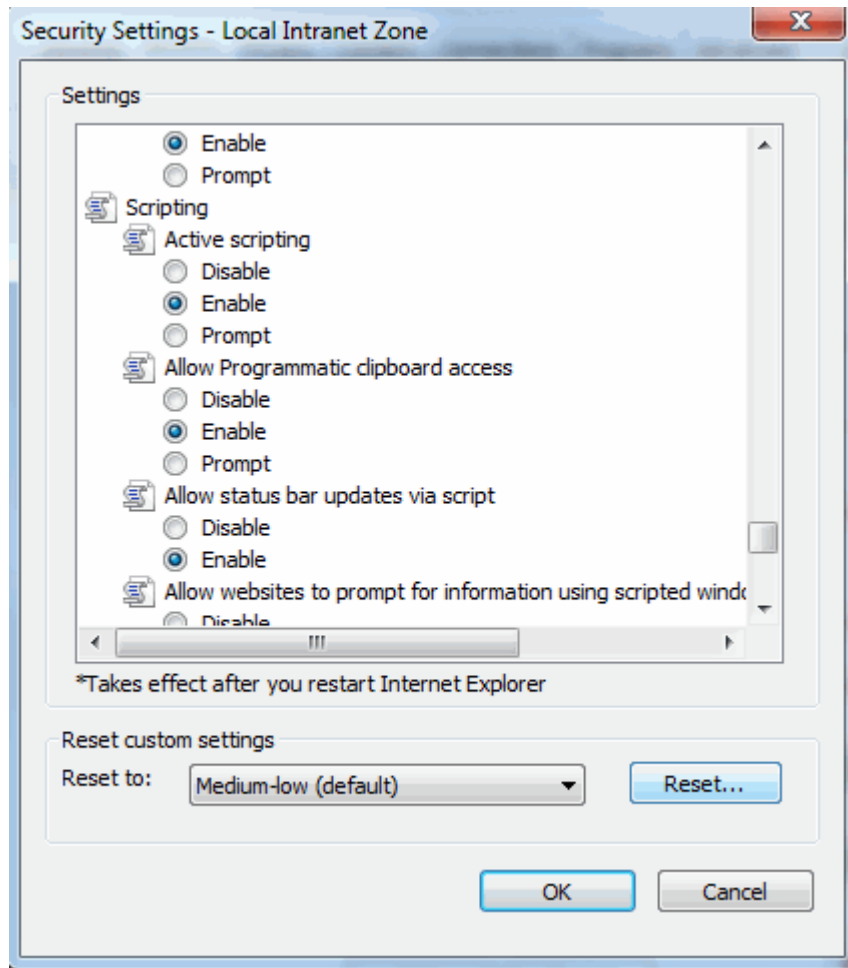
5. Scroll down through the options to the Scripting option, and click the **Enable** the radio button for the option of: **Allow Programmatic clipboard access.**

6. Click **OK** to save changes and close the Security Settings window.

7. Click **Yes** to confirm (if prompted).

8. Click **OK** to close the Internet Options window.

RESULTS

You have successfully pasted content into the editor.

Permissions Overview

The permission system is a very flexible mechanism used to define the actions a given user can perform within the general context of the portal, or within a given portlet and its data.

The main concept behind the portal's permission system are those of actions and resources. So, permissions in Covisint's portal are defined as actions on a given resource. Examples of actions would be: VIEW, UPDATE, MOVE, etc. Examples of resources (as shown below) could be: Home page, What's New portlet, Attention Auto Portal Customers web content, and the overview document. Note that these examples may each have a different degree of specificity.

> Administrators are able to apply unique permission to portal pages, portlets, web content, and documents. Administrators usually control permissions on a page and portlet, while giving General Users of CMS the ability to modify permissions on articles and documents.
> Permissions must be set for each item, including the:
> 1. page on portal
>   2. portlet on page
>   3. article in portlet
>   4. document in article
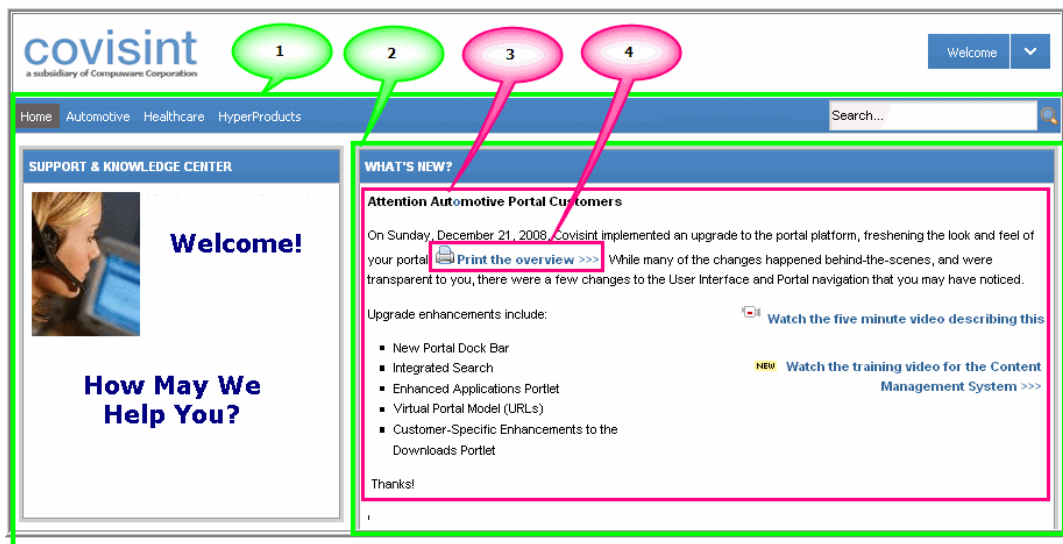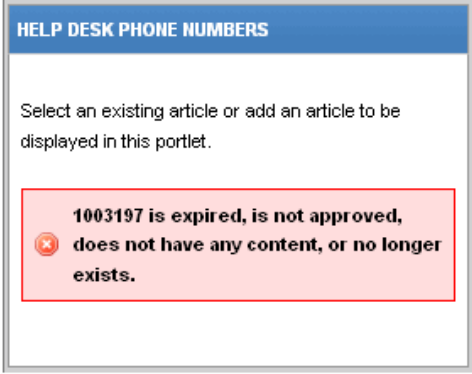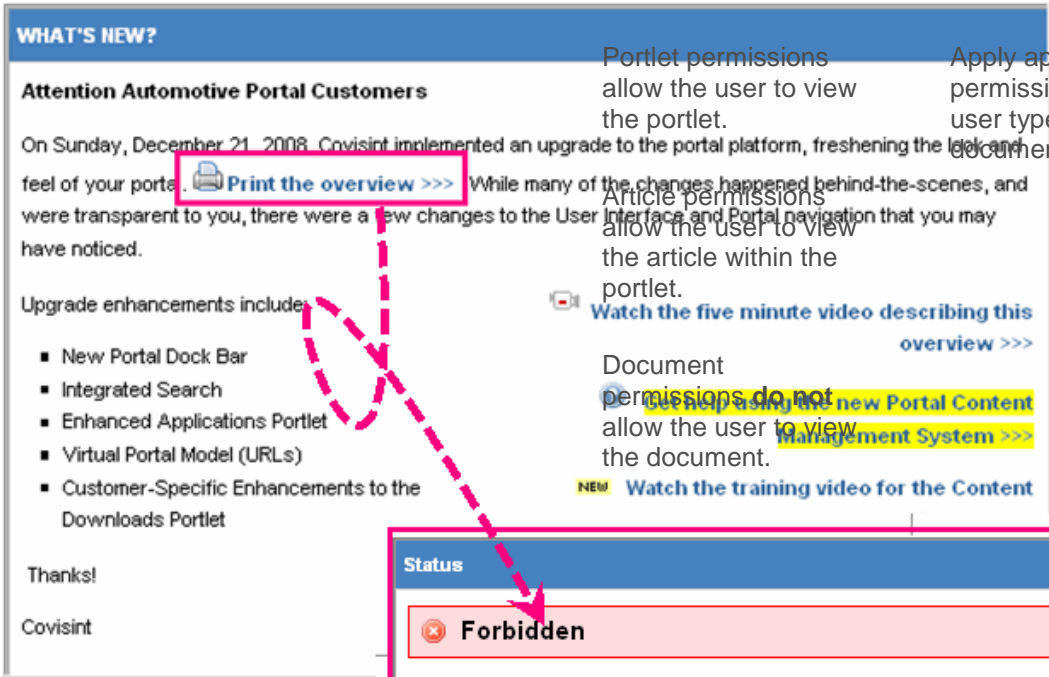
Unless your Administrator has changed the default settings, then:

- Administrators set permissions on pages (Home page) and portlets (What's New? portlet) (items 1, 2)
- Content Contributors set permissions on web content (Attention Auto Portal Customers) and document (Print the overview) (items 3, 4)

Permission Error Types

ERROR	ISSUE	HOW TO RESOLVE
HELP DESK PHONE NUMBERS Select an existing article or add an article to be displayed in this portlet. ❌ 1003197 is expired, is not approved, does not have any content, or no longer exists.	Portlet permissions allow the user to view the portlet. Article permissions **do not** allow the user to view the article within the portlet.	Apply appropriate permissions for this user type to the article.

ERROR	ISSUE	HOW TO RESOLVE

WHAT'S NEW?

Attention Automotive Portal Customers

On Sunday, December 21, 2008, Covisint implemented an upgrade to the portal platform, freshening the look and feel of your portal. Print the overview >>> While many of the changes happened behind-the-scenes, and were transparent to you, there were a few changes to the User Interface and Portal navigation that you may have noticed.

Upgrade enhancements include:

- New Portal Dock Bar
- Integrated Search
- Enhanced Applications Portlet
- Virtual Portal Model (URLs)
- Customer-Specific Enhancements to the Downloads Portlet

Thanks!

Covisint

Watch the five minute video describing this overview >>>

See how to using the new Portal Content Management System >>>

NEW Watch the training video for the Content

Portlet permissions allow the user to view the portlet.

Article permissions allow the user to view the article within the portlet.

Document permissions **do not** allow the user to view the document.

Apply appropriate permissions for this user type to the document.

Status

❌ **Forbidden**

You do not have permission to access the requested resource.

https://portal.covisint.com/c/document_library/get_file?f

« Back

A user cannot see the article or the document because the user cannot see the portlet on the page	Portlet permissions **do not** allow the user to view the portlet.	Contact your Portal Content Administrator to modify portlet permissions if appropriate.

ERROR	ISSUE	HOW TO RESOLVE
(i) If a user type is given VIEW permission on a document, but not on the article, portlet, nor page upon which the document is located, the user will be able to perform a search in the portal search field and find the document in the search results.		

Welcome ⌄

➡ Search... 🔍

✅ view permission on document
❌ view permission on article
❌ view permission on portlet
❌ view permission on page

Granting / Modifying Permissions on a Web Content Article

1. Navigate to the web content article for which you wish to modify permissions.

2. Click **Actions**.
3. Click **Permissions**.

4. Enable the permissions for each role as desired by checking the appropriate boxes.
5. Turn off permissions per role as necessary by removing the checkboxes as appropriate.
6. Click **Save**. The screen refreshes, and permissions are applied to the article.

If a user type is given VIEW permission on a document, but not on the article, portlet, nor page upon which the document is located, the user will be able to perform a search in the portal search field and find the document in the search results.
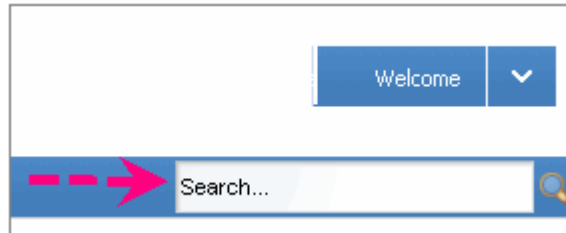
⊘ view permission on document
⊗ view permission on article
⊗ view permission on portlet
⊗ view permission on page

RESULTS

You have successfully modified permissions of an article.

Reinstating a Previous Version of an Article

To restore a previous version of a Web Article, delete newer versions of the article.

Restoring previous versions of Web Content deletes newer versions permanently.

---

1. Navigate to the desired Web Content article.
2. Click View History.

Project Description Page

ID: 45975 Version: **1.4** Status: **Approved**

Permissions   View History
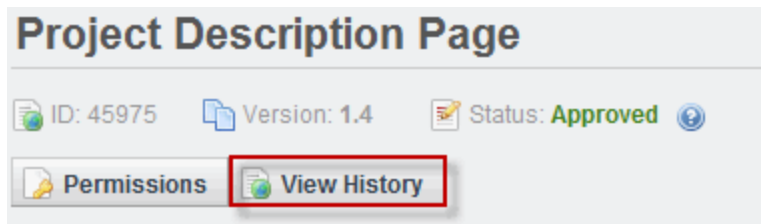
3. Select the Article version(s) that precede the version to restore.
4. Click **Delete**.

Project Description Page   « Back

Expire Delete

	ID	Title	Version ▲	Status	Modified Date	Display Date	Author	
☐	45975	Project Description Page	1.0	Approved	8/1/12 11:00 AM	8/1/12 10:59 AM	Andy Durch	◄ 🔑 Actions
☐	45975	Project Description Page	1.1	Approved	8/3/12 10:30 AM	8/1/12 10:59 AM	Andy Durch	◄ 🔑 Actions
☐	45975	Project Description Page	1.2	Approved	8/8/12 3:41 PM	8/1/12 10:59 AM	Andy Durch	◄ 🔑 Actions
☑	45975	Project Description Page	1.3	Approved	9/7/12 3:23 PM	8/1/12 10:59 AM	Andy Durch	◄ 🔑 Actions
☑	45975	Project Description Page	1.4	Approved	9/11/12 1:26 PM	8/1/12 10:59 AM	Andy Durch	◄ 🔑 Actions

Showing 5 results.

5. Click **Back**. The previous version is now active.
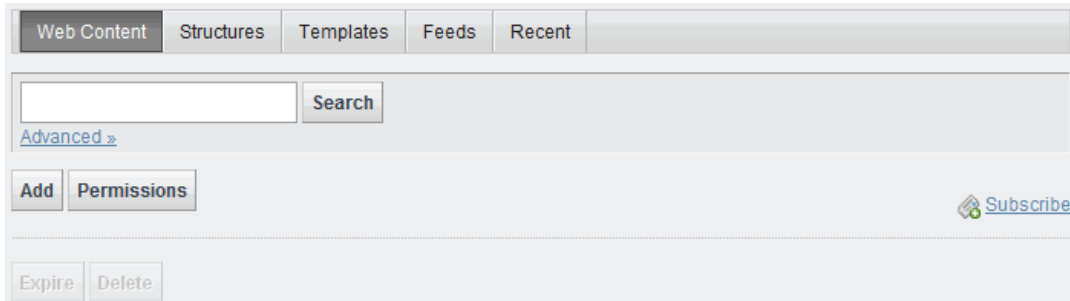
RESULTS

You have successfully restored a previous version of web content.

Searching / Viewing a Web Content Article
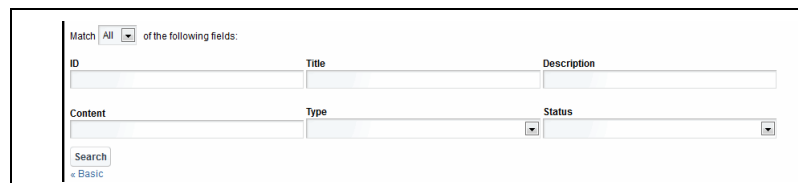
1. Access the Web Content Administration Portlet.

2. Key in the web content ID number in the open text field.
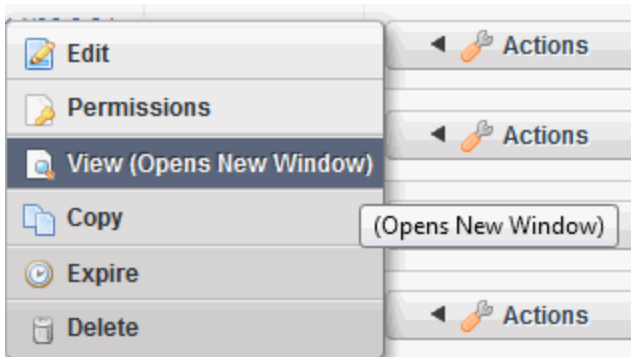
> If you do not know the ID number, search by article name, by **clicking Advanced >>**
>
>

3. Click **Search.** The search results are displayed.

4. Click Actions.
5. Click **View (Opens new Window)**. View previews web content that is added based on structure and template.

RESULTS

You have successfully searched for and viewed a web content article.

Setting Content Expiration

Expired content can no longer be viewed or accessed in the repository, but is archived as a previous version.

1. Navigate to a file in the repository.
2. Click **Edit**.
3. Click Schedule.
4. Under **Expiration Date**, use the drop-downs to select month, day, year, and time. Click
   the calendar icon to select a date using a calendar.

Schedule

Display Date
October ▼ | 14 ▼ | 2008 ▼ | 📅 | 8 ▼ | :06 ▼ | PM ▼

Expiration Date
October ▼ | 24 ▼ | 2012 ▼ | 📅 | 5 ▼ | :38 ▼ | AM ▼

☐ Never Auto Expire

Review Date
August ▼ | 6 ▼ | 2013 ▼ | 📅 | 5 ▼ | :26 ▼ | PM ▼

☑ Never Review

4. Click **Publish**.

RESULTS

You have successfully set an expiration date for Portal content.

DOCUMENTS AND MEDIA LIBRARY

Documents and Media Portlet Overview

The Documents and Media Display portlet shows chosen hierarchies of folders and files from the Documents and Media library.

Files

Adding an File to the Documents and Media Library

Complete the following steps to add a file to the Documents and Media Library.

1. Access the Documents and Media Library.
2. Navigate to and *click on the folder* in the Documents and Media library in which you wish to add the file.
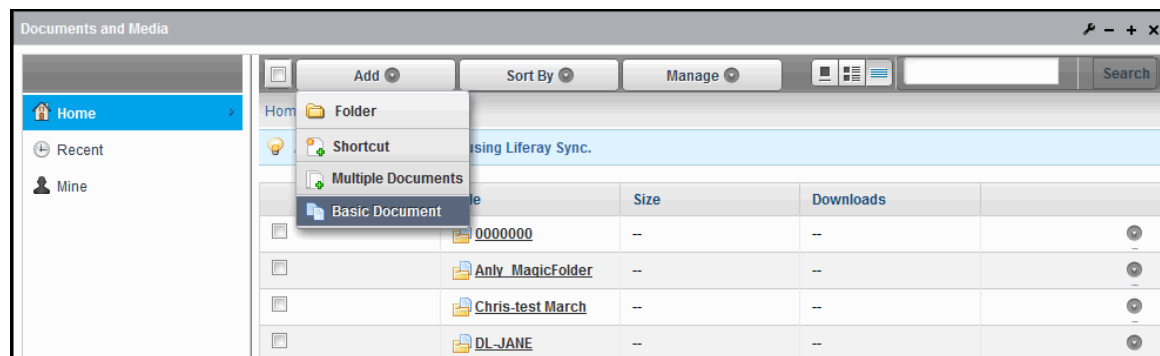
3. Click **Add**.
4. Click Basic Document**.**
5. **Browse** and select the file to upload.
6. Key in an file name, and an easily identifiable description for the file in the open text fields.
7. Click **Save**. After saving, you are returned to the folder in which you saved the file.

RESULTS

You have successfully added an file to the Documents and Media Library.

Editing a Document

Complete the following steps to edit a document stored in the Documents and Media Library. The following steps for editing include checking out the document (an optional step) to prevent others from making changes to it while you are working on it.

> Note: You are able to take a shortcut to editing a document and bypassing the check in/check out feature described below. However, the document is not locked and therefore others are not prevented from editing at the same time, possibly writing over your edits.

1. Access the Documents and Media Library.
2. Navigate to the document you wish to edit.
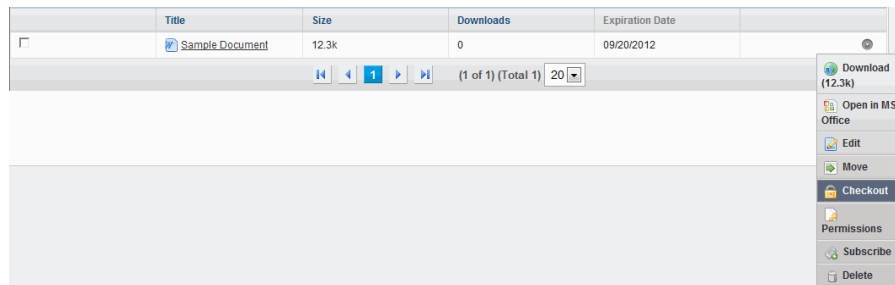
3. Optionally, check out the file to prevent others from editing it while you are working with the file.
4. Click .
5. Click **Download** (to download the file to your desktop), and save the file to your desktop.
6. Edit as necessary (outside of the CMS system) and save the file (outside of the CMS system).
7. Navigate to the file in the document library.
8. Upload the edited version of the file by clicking next to the file name.
9. Click **Edit**.
10. Click **Browse** and select the edited document you wish to upload to the portal.
11. Scroll to the bottom of the screen and click **Publish**. The screen refreshes and the edited file is uploaded.
12. Check in the document (if necessary).

RESULTS

You have successfully edited a document.

Deleting a Document

Complete the following steps to delete a document from the Documents and Media Library. Performing the steps below will permanently delete the active version plus all previous versions of the document.

> **(i)** There is no recycle bin in this system. Once you delete an item, it is completely removed from the system.

1. Access the Documents and Media Library.
2. Navigate to the document you wish to delete.

3. Click **(•)**.
4. Click **Delete**.
5. Click **OK** to confirm deletion. (Remember, if web content on your portal contains a link pointing to this document, edit the article to either remove the link or redirect it to an active document.)
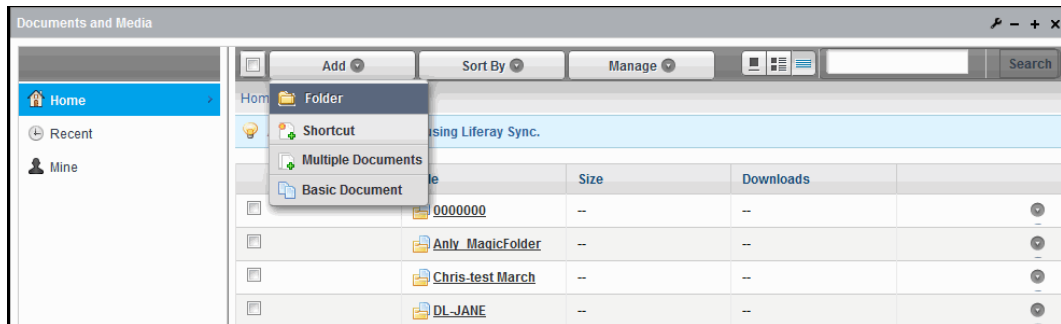
RESULTS

You have successfully deleted a document.

Folders

Creating a Folder

1. Access the Documents and Media library to add a folder.

2. Click **Add**.
3. Click **Folder.** If you wish to add a subfolder to an existing folder, refer to the topic Adding a subfolder.

4. Key in the Name of the folder.

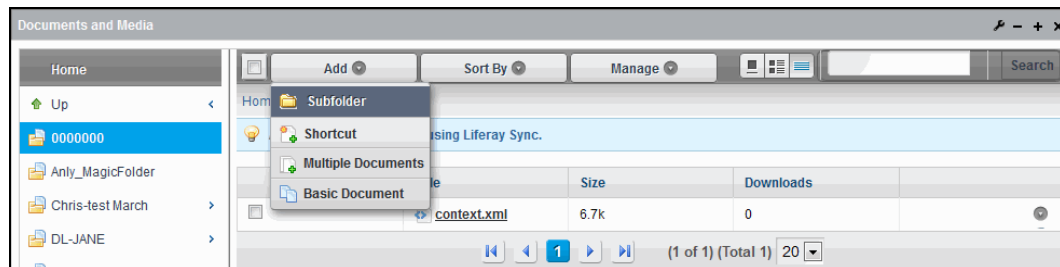> By default, new folders inherit the permissions from the parent folder.

5. Click **Save**. The screen refreshes and the new folder is created.
6. Optionally, add more folders or subfolders to further divide your items into more specific categories by repeating steps 2 - 5.

RESULTS

You have successfully created a new folder in the Documents and Media Library.

Adding a Subfolder

1. Access the Documents and Media Library.
2. Drill down through the folders, to the folder in which you wish to add a subfolder. (This example adds a subfolder to the Project Files folder.)

3. Click Add. Select Subfolder.

4. Key in the Name of the folder.

> By default, new folders inherit the permissions from the parent folder.

5. Click **Save**. The screen refreshes and the new sub-folder is created.
6. Optionally, add more folders or subfolders to further divide your items into more specific categories by repeating steps 2 - 5.
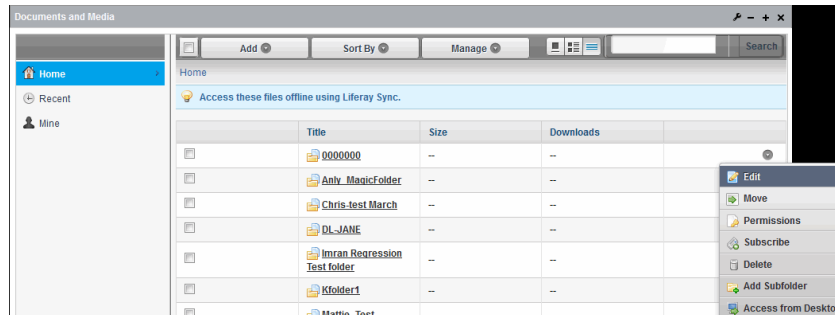
RESULTS

You have successfully added a subfolder.

Editing Folder Properties

1. Navigate to the folder you wish to edit in the Documents and Media Library.

2. Click ⌄ .
3. Click **Edit**.
4. Modify the folder name / description as desired.
5. Click **Save**.

RESULTS

You have successfully edited folder properties.

Content Publisher User Guide

Deleting a Folder

Complete the following steps to delete a folder from the repository. Performing the steps below will permanently delete the folder, plus all subfolders and content within the folder.

> There is no recycle bin in this system. Once you delete an item, it is completely removed from the system.

1. Access the Documents and Media Library to delete a folder.
2. Navigate to the folder you wish to delete.
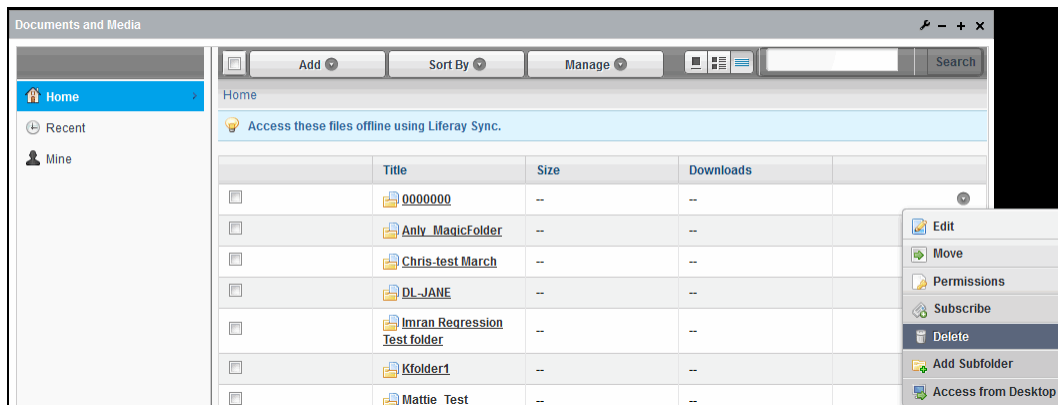
3. Click ⊙.
4. Click **Delete**.
5. Click **OK** to confirm deletion. The folder, and all contents within the folder, are deleted from the system. (Remember, if web content on your portal contains a link pointing to this item, edit the web content article to either remove the link/item, or redirect it to an active item.)

RESULTS

You have successfully deleted a folder.