

Content Self Service Administrator User Guide

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OVERVIEW

Overview of the Content Management System

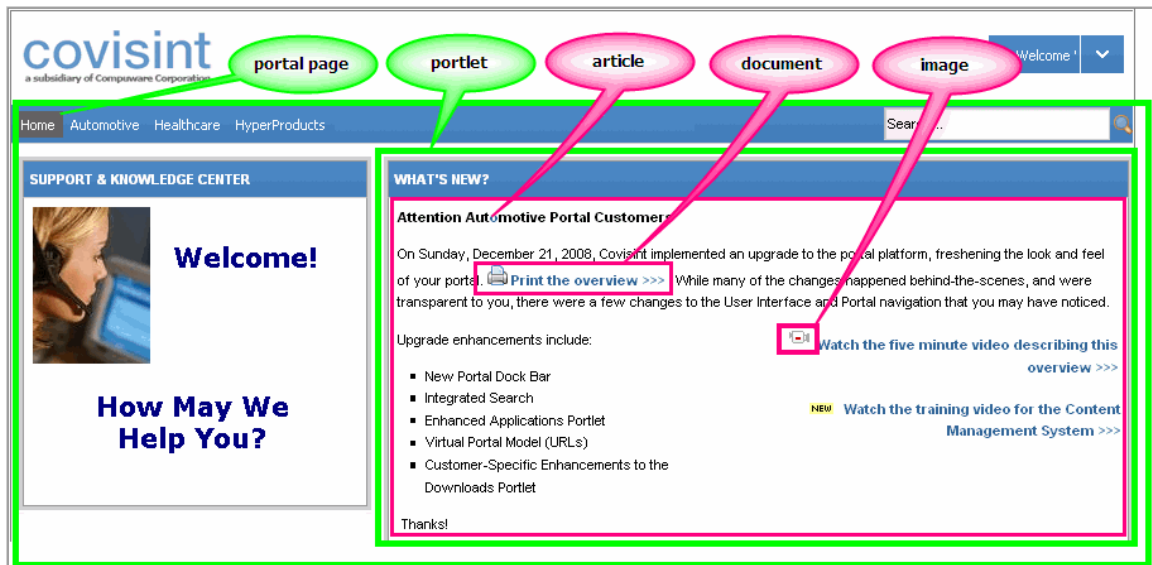
Covisint's Portal provides Content Management System functionality in two major areas: **document management** and **publishing**. Document management is provided through Covisint's Documents and Media portlet. This portlet provides intuitive management of your organization's files and images.

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.

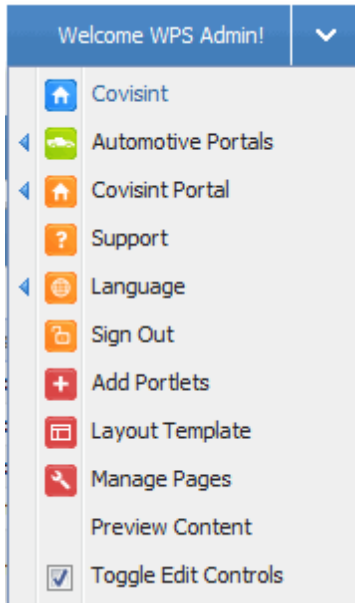
It is highly recommended that you review the section entitled Permissions Overview before beginning to work in the Content Management System.



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

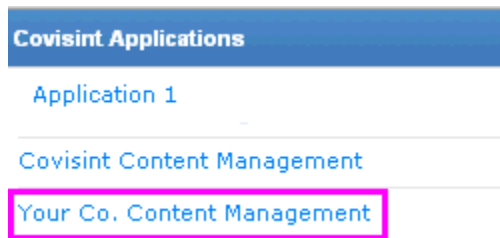
The following checklist is designed to help get you started using Covisint's Content Management system.

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.

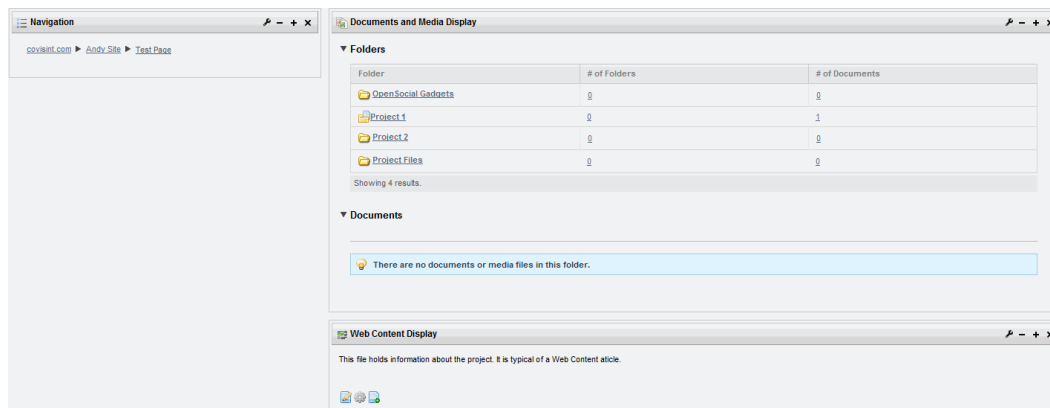
TASK:	REVIEW THE TOPIC:
Identify the Documents and Media Library, and the Web Content Portlet.	Accessing the Portal Content Management System
Review permission requirements on Documents, Articles, and Portlets. It is highly recommended that you review the Permissions Overview section before beginning 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

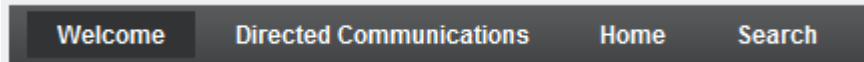
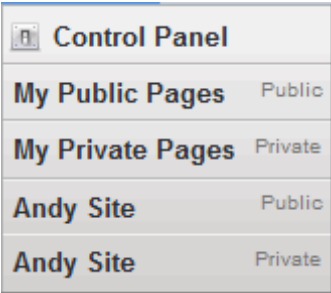


Tasks are role-based. If you do not have access to perform some of the tasks in this support material, you have most likely not been given the role to do so. Check with your Content Management Administrator for details.

PORTAL PAGES

Types of Pages Used to Publish Content on the Portal

There are three types of pages that can be used to publish content to the portal. Those are:

PAGE TYPE:	EXAMPLE:
Portal tabs - referred to in CMS as <i>pages</i> . Also known as main pages, toolbar menus (Can be set to private or public). How do I add a page?	
Menu options - referred to as <i>child pages</i> in CMS. Also known as drop-down menus (Can be set to private or public).	

RESULTS

You have successfully reviewed the types of pages used in portal.

Public Page Requirements

The purpose of public pages are to provide a community with a "website" style means of publishing information to all users of the portal.



Public pages are viewable by all users of the portal.

Community Owners/Administrators oversee and control the content on these pages.

Public pages must adhere to the following requirements:

- Inherit the header, logo and horizontal (cascading) navigation from the portal
- Concatenate breadcrumb navigation from the portal
- Have vertical navigation that is dynamically generated based on public pages within that community
- Allow for the hiding of pages from the dynamic vertical navigation
- Allow Community Owners/Administrators to Manage Pages
- Allow Community Owners/Administrators to add, update, drag and drop, configure and delete portlets.

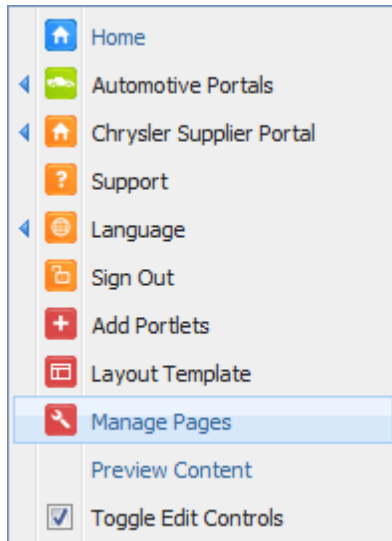
RESULTS

You have successfully reviewed public page requirements.

Adding a Page

With appropriate roles, users are able to add pages to their organization's portal. If you wish to add a portal page for your organization to access, complete the steps below. The steps described here add a new tab to the top navigation link on the portal. If you wish to add a page to an existing tab or page, complete the steps for adding a child page.

1. From the Welcome menu, click **Manage Pages**.

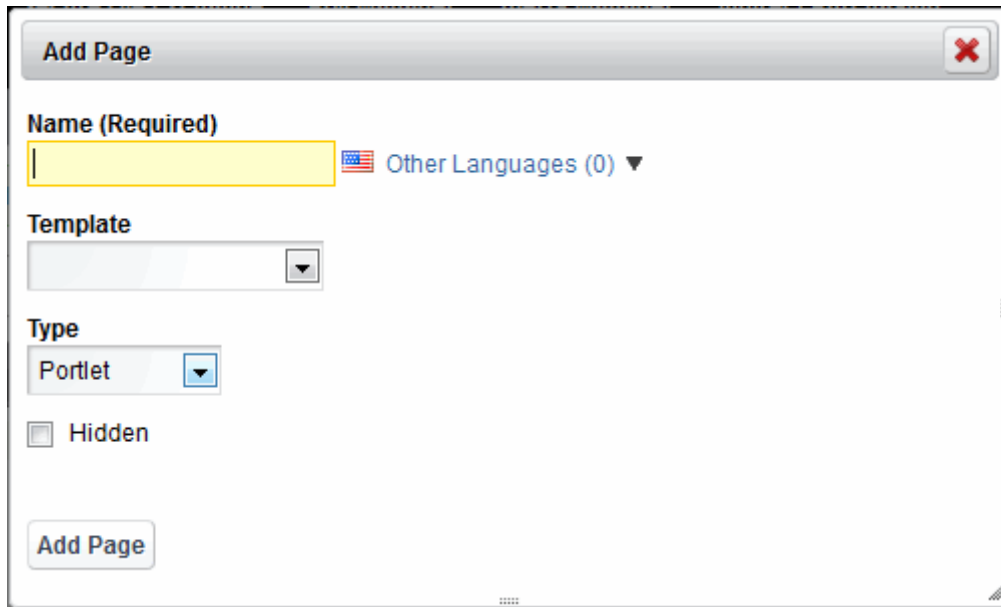


2. Click on the top level item in the tree structure (the portal name). (Public Pages in this example).
3. Click **Add Page**.



A good rule of thumb when adding a new page is to select "HIDDEN" so that only you can see the newly added page, preventing others from viewing the page until you have it configured properly. Once you have configured the page to display as you wish, disable the "HIDDEN" option if desired, and create links to the page from other pages.

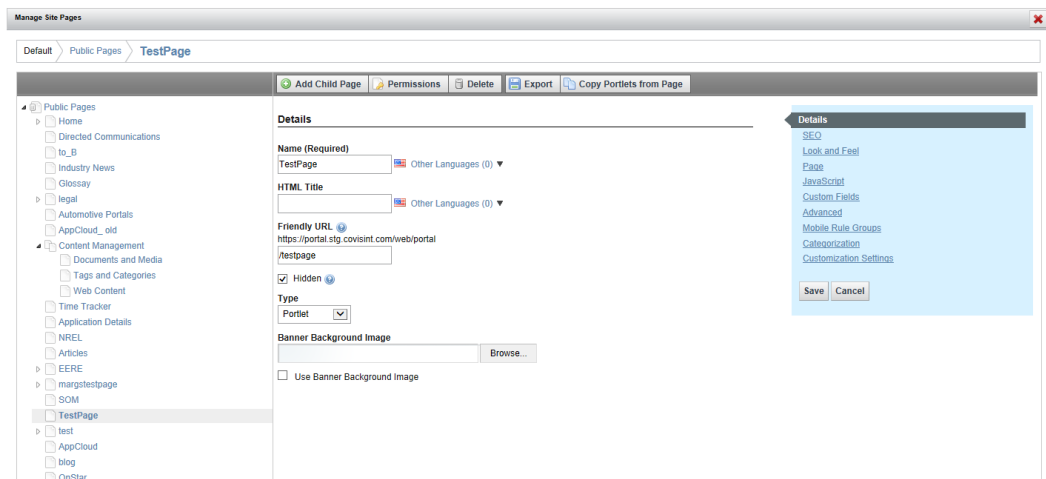
4. Key in the *name of the New Page* in the Name open text field. (The menu option will display the name you key into this field).
5. If you wish for this page to remain hidden from view, enable the *Hidden* checkbox.
6. Click **Add Page**. The new page is added to the tree structure.



The 'Add Page' dialog box contains the following fields and controls:

- Name (Required):** A text input field with a yellow border.
- Other Languages (0):** A dropdown menu with a US flag icon.
- Template:** A dropdown menu.
- Type:** A dropdown menu with 'Portlet' selected.
- Hidden:** A checkbox.
- Add Page:** A button at the bottom.

- Click on the new page in the tree structure. (**TestPage** in this example).



The 'Manage Site Pages' dialog box shows a tree structure on the left and a details panel on the right. The tree structure includes:

- Public Pages
 - Home
 - Directed Communications
 - to_B
 - Industry News
 - Glossary
 - legal
 - Automotive Portals
 - AppCloud_old
- Content Management
 - Documents and Media
 - Tags and Categories
 - Web Content
 - Time Tracker
 - Application Details
 - NREL
 - Articles
 - EERE
 - margstestpage
 - SOM
 - TestPage** (highlighted)
 - test
 - AppCloud
 - blog
 - OnStar

The details panel for 'TestPage' includes the following fields and controls:

- Name (Required):** TestPage
- HTML Title:** TestPage
- Friendly URL:** https://portal.stg.covisint.com/web/portal/testpage
- Hidden:** ☒
- Type:** Portlet
- Banner Background Image:** A text input field with a 'Browse...' button.
- Use Banner Background Image:** ☐

On the right side of the details panel, there is a 'Details' tab with a list of links: SEO, Look and Feel, Page, JavaScript, Custom Fields, Advanced, Mobile Rule Groups, Categorization, and Customization Settings. At the bottom of this list are 'Save' and 'Cancel' buttons.

- Key in the HTML Title as you wish it to appear in the browser window in the open text field.
- Create the navigation link by determining the *type* of page (navigation) from the drop down menu. Types are defined as:
 - Portlets - link to other portlets on the portal
 - Panel - (not in use)
 - Embedded link (not in use)
 - URL (outside of this portal)
 - Link to Page (another page within the portal)
- In the Friendly URL field, key in the name of the remainder of the URL preceded by a /. The text keyed in to this field will appear in the URL. In this example, the Friendly URL added as: "/trainingpage"
- Perform one or more of the following:

If you selected page type:	Then...
Article	Key in the Article ID number in the open text box. Where do I find the Article ID?
URL	Key in the URL to which you wish to create a link for this page in the open text box.
Link to Page	Select the page existing within the portal that you wish to link from the drop down menu.

12. Click **Save**. The screen refreshes, and the new page is added.

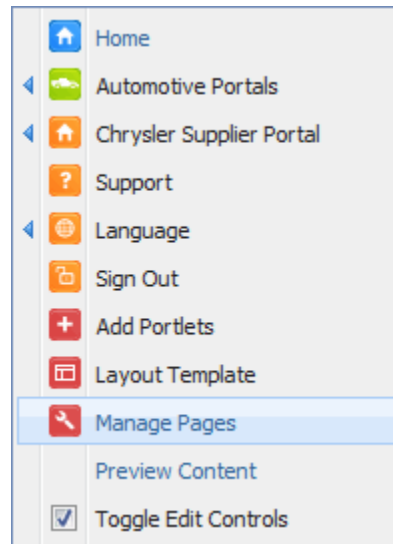
RESULTS

You have successfully added a page.

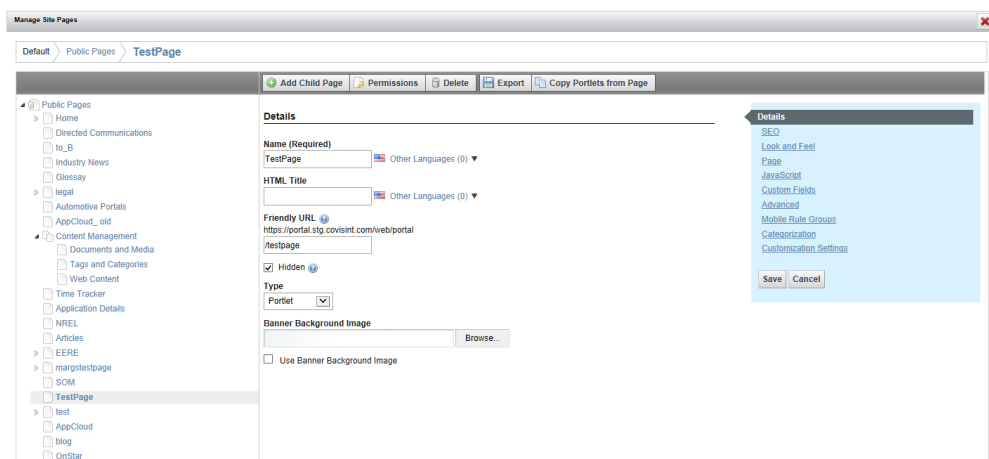
Managing Portal Pages

In addition to the CMS page, you will also use menu options available from the Welcome Menu (also referred to as the drop down menu) are the following options:

- Add Portlets
- Layout Template
- Manage Pages



1. Click **Manage Pages** link from the Welcome menu in the upper right corner of the screen. The Manage Pages screen is displayed. Here you can view the values in the Details tab. The values appear in the default language. For example, if you have set English (United States) as the default language, all the values appear in English.



2. Navigate to the page you wish to manage by clicking on it in the left menu of pages.
3. In the Name text box, enter the *name* of the page. By default, the already assigned name of the page appears.
4. In the HTML Title text box, enter a *title* for the HTML page.

5. From the Type drop down list, modify the type of the page. By default, the type of the page is Portlet.
6. Select the Hidden check box, if you want the page to be hidden.
7. Perform one or more of the following:

If you changed page type to:		Then...
URL		Key in the URL to which you wish to create a link for this page in the open text box.
Link to Page		Select the page existing within the portal that you wish to link from the drop down menu.

8. Click **Save**. The page is refreshed and the updates you made are displayed.

RESULTS

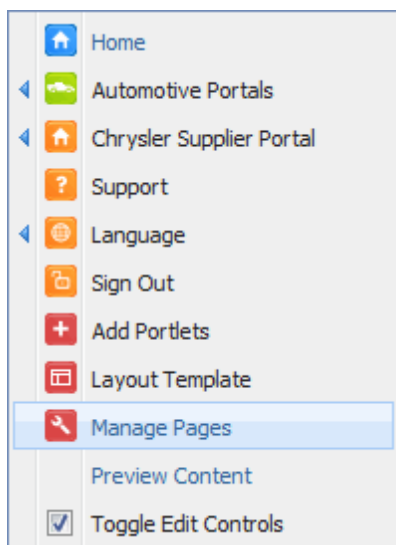
You have successfully managed portal pages.

Adding a Page in Multiple Languages

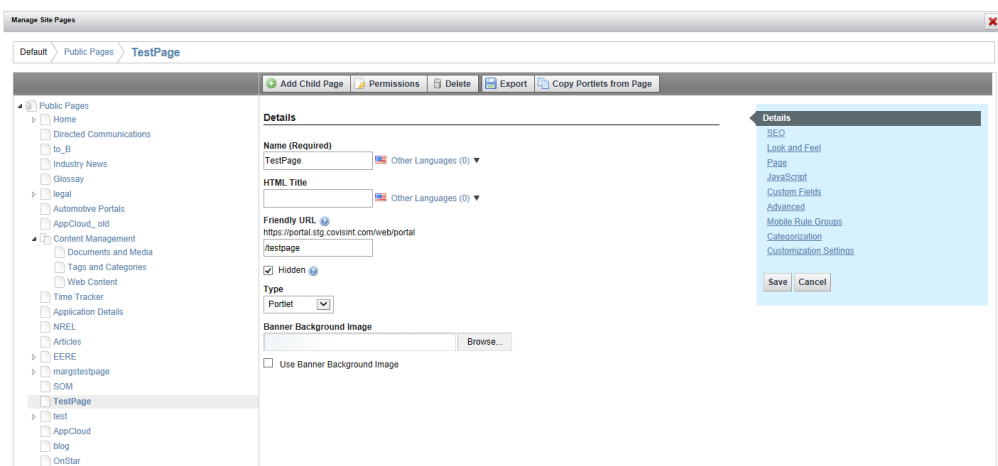
Complete the following steps to add language options to portal pages after the page has been created in the default language.

Users' language preferences are determined from their browser settings for users that are not logged in to the portal. Logged in users' language preferences are determined from their account profiles within the Covisint Administration tool. If a user's preferred language type is not available, portal content will display in the default language (English in this example).

1. From the Welcome menu, click **Manage Pages**.



2. Click on the page in the tree structure that you wish to add in multiple languages. (This example uses TestPage).
3. Click **Details** tab.



4. From the Other Languages drop down menu, select the target language. (This example uses French).
5. Key in the localized French name of the Page in the open text field. (The menu option will display the name you key into this field).
6. Key in the localized French HTML Title name in the open text field.
7. Click **Save**. The screen refreshes, and the new language is added.
8. Repeat steps 4 - 7 for additional languages as necessary.

RESULTS

You have successfully added a page in multiple languages. You may wish to add multiple languages to the Portlet title, and the article displayed in the portlet.

Adding a Child Page

Adding a child page to your organization's portal is different then adding your 'own' personal page. If you wish to add a portal page for your organization to access, complete the steps below. A child page will display on the portal as a menu option. If you wish to add a new top level page to appear in the top navigation menu on the portal, complete the steps for adding a page.

1. Navigate to the location in which you wish to add an additional child page on the Manage Pages screen. (This example will add a child page to the TestPage page).
2. Click Add Child Page.

3. Key in the name of the New Page in the Name open text field. (The menu option will display the name you key into this field).
4. Determining the *type* of page (navigation) from the drop down menu. Types are defined as:
 - Portlet - link to other portlets on the portal
 - Panel - (Not in use)
 - Embedded link (Not in use)
 - URL (outside of this portal)
 - Link to Page (within the portal)
5. If you wish for this page to remain hidden from view, enable the *Hidden* checkbox.
6. If you wish for this page to inherit permissions from the parent page, enable the *Copy Parent* checkbox. Otherwise, modify permissions after completing step 8.
7. Perform one or more of the following:

If you selected page type:	Then...
URL	Key in the URL in the open text box.
Link to Page	Select the page existing within the portal that you wish to link from the drop down menu.

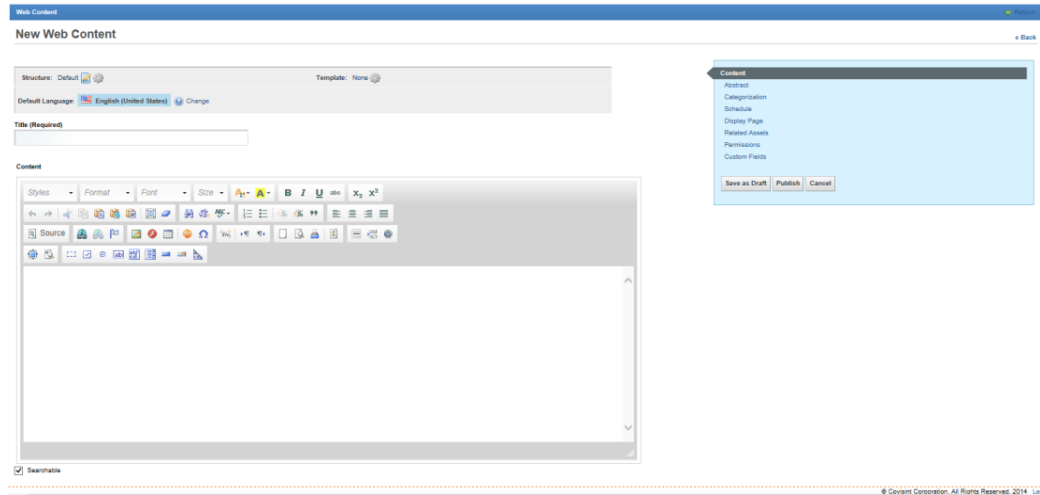
8. Click **Add Page**. The screen refreshes, and the **new page is added**.

RESULTS

You have successfully added a child page.

Changing a Page Name

1. Navigate to page you wish to rename on the Manage Pages screen.



2. Click on the page (listed in the tree structure) that you wish to rename. This example uses TestPage.
3. In the *Name* open text field, key in the new name as you wish it to appear in the menu options.
4. Click **Save**.

RESULTS

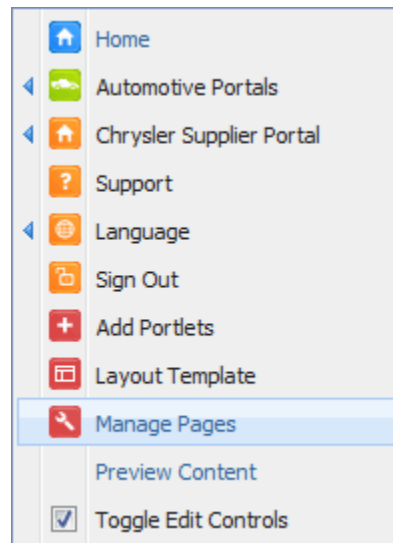
You have successfully renamed a page.

Managing Portal Pages

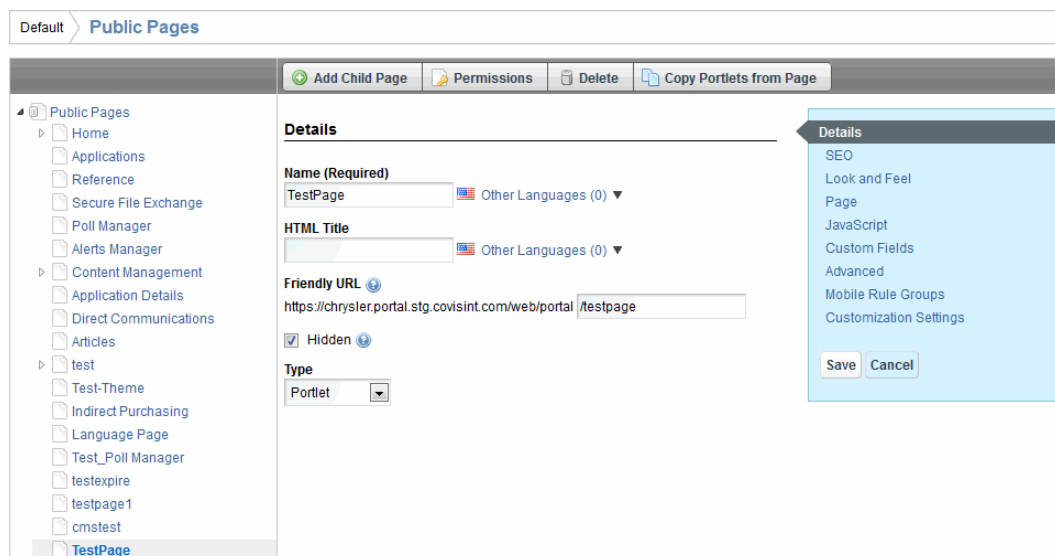
In addition to the CMS page, you will also use menu options available from the Welcome Menu (also referred to as the Dock Bar) to manage pages.

Included in this drop down menu are the following options:

- Add Portlets
- Layout Template
- Manage Pages



1. Click **Manage Pages** link from the Welcome menu in the upper right corner of the screen. The Manage Pages screen is displayed. Here you can view the values in the Details tab. The values appear in the default language. For example, if you have set English (United States) as the default language, all the values appear in English.



2. Navigate to the page you wish to manage by clicking on it in the left menu of pages.

3. In the Name text box, enter the *name* of the page. By default, the already assigned name of the page appears.
4. In the HTML Title text box, enter a *title* for the HTML page.
5. From the Type drop down list, modify the type of the page. By default, the type of the page is Portlet.
6. Select the Hidden check box, if you want the page to be hidden.
7. Perform one or more of the following:

If you changed page type to:	Then...
URL	Key in the URL to which you wish to create a link for this page in the open text box.
Link to Page	Select the page existing within the portal that you wish to link from the drop down menu.

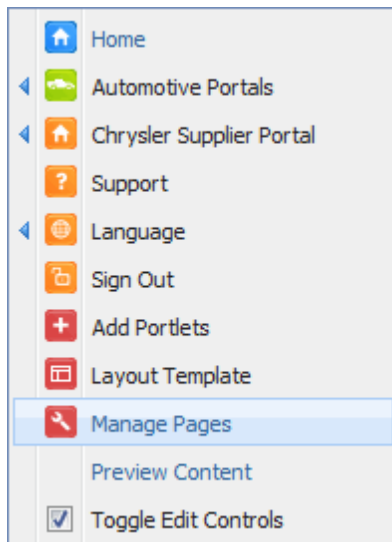
8. Click **Save**. The page is refreshed and the updates you made are displayed.

RESULTS

You have successfully managed portal pages.

Details of the Manage Pages Screen

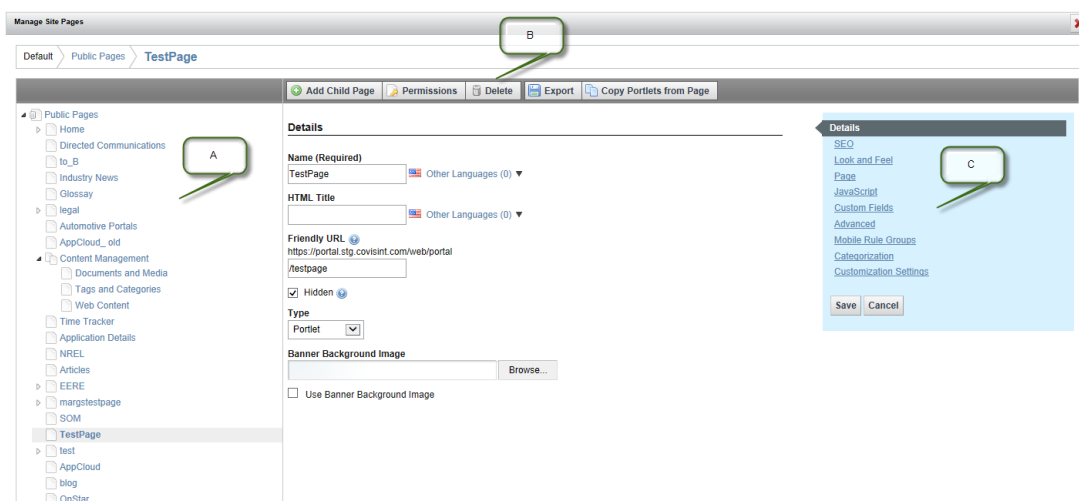
Welcome Menu



From the Welcome Menu, click **Manage Pages**. The Manage Pages Screen is displayed.



Note: Your pages, tabs, etc. will be labeled differently. For example, you may not have tabs named "Corporate" or "Quick Links". However, the details below apply to the pages, tabs, etc. that you do see on your portal.



Details of the Manage Pages Screen

ITEM:	DESCRIPTION:
A	Pages in the content management system. (Refer to Adding a Page for details).
B	Menu Options for the Page currently selected.
C	<ul style="list-style-type: none">• Details tab - enables you to modify the page name and properties in which you are currently working (The Community tab, in this example)• Look and Feel tab - enables you to use the available templates to create your page, or create your own theme*, color scheme*, and css*. (*If your organization has allowed this flexibility).

All of these topics are covered in greater detail in this support material.

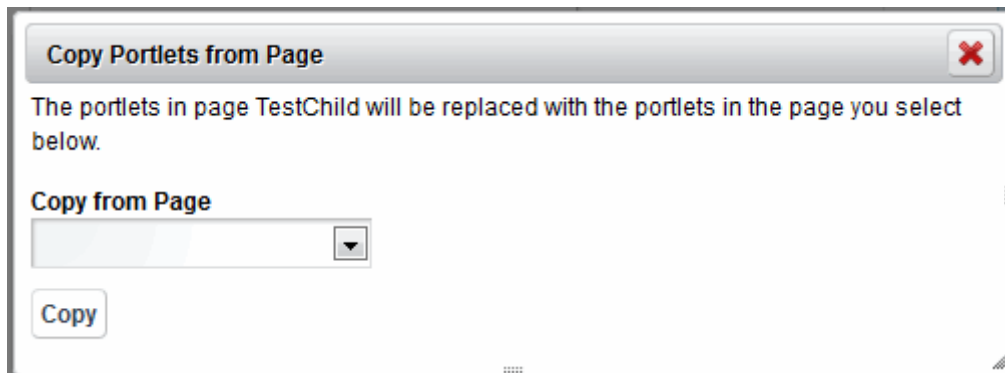


Tasks are role-based. If you do not have access to perform some of the tasks in this support material, you have most likely not been given the role to do so. Check with your Content Management Administrator for details.

Copying a Page to a New Page

Complete the steps below to create a copy of a page.

1. Create a new page from the manage pages screen.
2. Click on the page name in the menu options.
3. Click on the **Details** tab.
4. Configure the page as desired.
5. Click Copy Portlets to Page button.



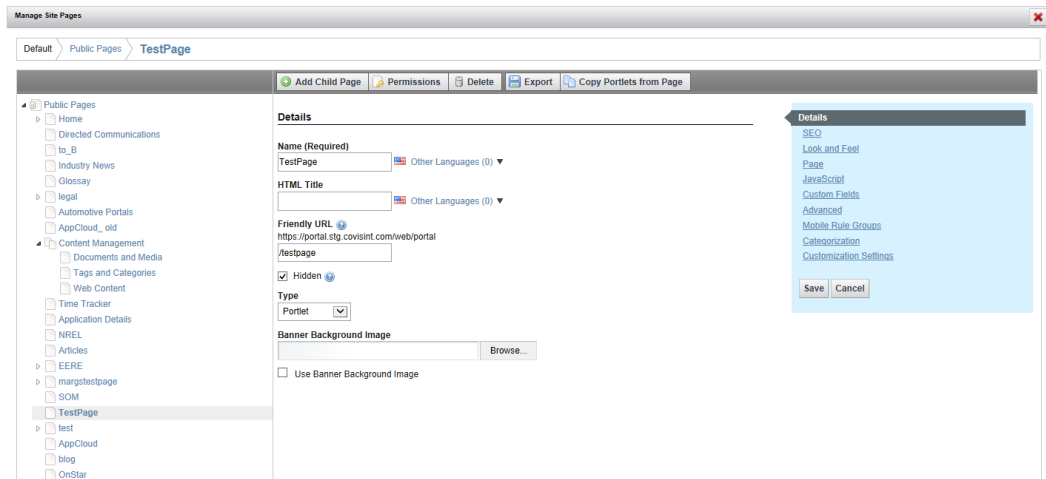
6. Select the existing page you wish to copy to this page from the list.
7. Click **Copy**. The screen refreshes, and the copy is made.
8. Optionally, you may wish to modify permissions of the page, change the page name, or resort the display order of pages.

RESULTS

You have successfully copied a page to a new page.

Deleting a Page

1. Navigate to page you wish to delete on the Manage Pages screen.



2. Click the *Page* you wish to delete in the left menu. (This example uses TestPage).
3. Click **Delete**.
4. Click **OK** to confirm deletion. The page and any child pages belonging to it are deleted from the system.

RESULTS

You have successfully deleted a page.

Modifying Page Permissions

1. On the Manage Pages screen, navigate to page for which you wish to modify permissions.
2. Click **Permissions**.

The screenshot shows the 'Manage Site Pages' window with the 'TestPage' selected. The 'Permissions' tab is active, displaying a list of roles and their permissions for the selected page. The roles listed are Owner, Portal Content Reviewer, Power User, Self Service Administrator, User, Organization Content Reviewer, Organization User, Community Content Reviewer, Site Content Reviewer, and Site Member. The permissions are represented by checkboxes in a grid.

3. Grant / Modify permissions as desired by checking the appropriate boxes.

Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Portal Content Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self Service Administrator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization Content Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Content Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Content Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Member	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

4. Click **Save**.

RESULTS

You have successfully modified permissions on a page.

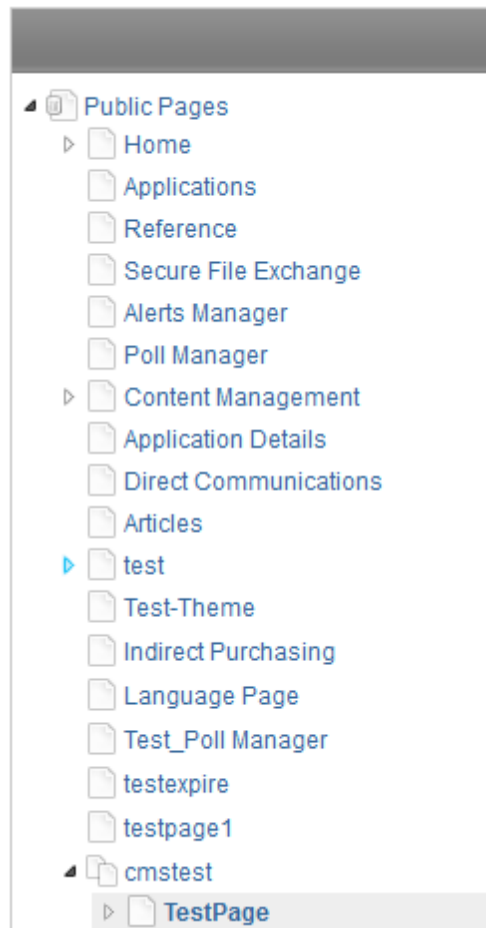
Moving a Child Page

In the screen examples below, the TestPage page (and its children) is a child page of cmstest. Using the drag and drop method in the steps below, the TestPage page (and its children) will be moved to testpage1.

1. Navigate to page you wish to move on the Manage Pages screen.
2. Using the Drag and Drop method, drag the page from its original location, and drop it into the new location

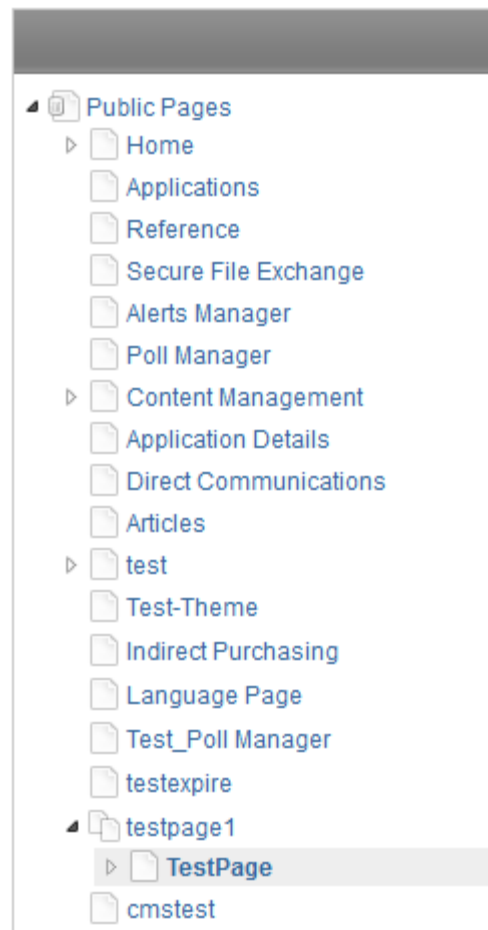
WHAT IT LOOKS LIKE BEFORE DRAGGING:

How to move it from cmstest:



RESULTS AFTER DROPPING TO NEW LOCATION:

The TestPage page, and its children pages have moved to testpage1.



- a. Click on **TestPage**.
- b. Drag and drop to **testpage1**.

2.

RESULTS

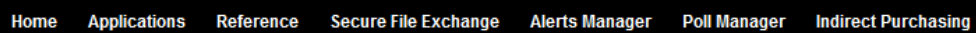
You have successfully moved a child page and its children (if applicable).

Moving Portal Tabs

This example moves the Applications Portal Tab.

1. Navigate to the main Portal Page.
2. Using the Drag and Drop method, drag the tab from its original location, and drop it into the new location.

WHAT IT LOOKS LIKE BEFORE DRAGGING:

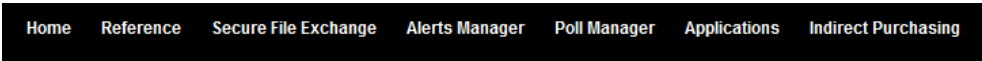


A horizontal navigation bar with a black background and white text. The tabs from left to right are: Home, Applications, Reference, Secure File Exchange, Alerts Manager, Poll Manager, and Indirect Purchasing.

- a. Click on Applications.
- b. Drag and drop to left of Poll Manager.

RESULTS AFTER DROPPING TO NEW LOCATION:

The Applications tab is now after Poll Manager.



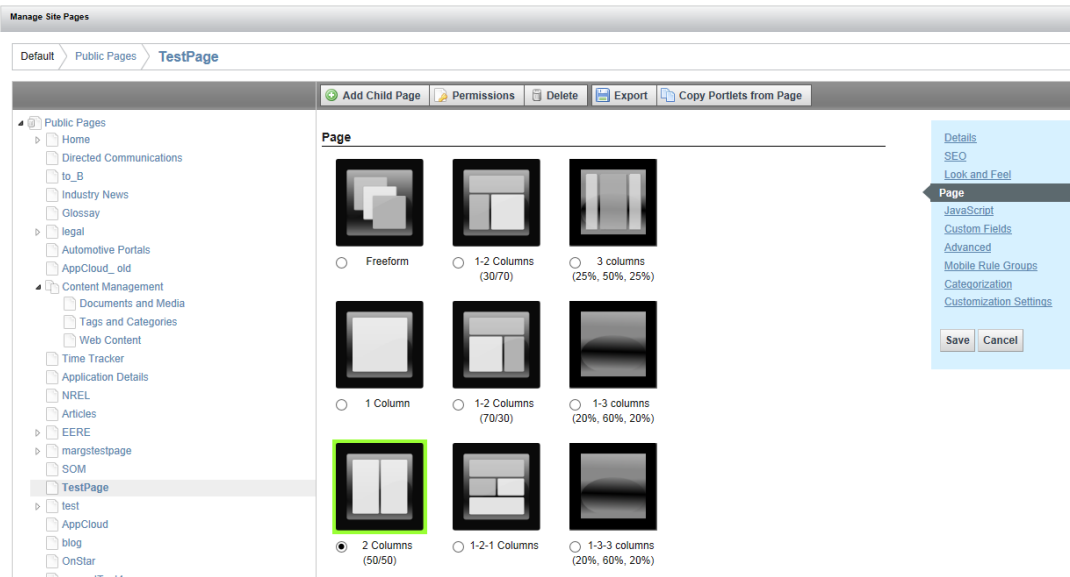
A horizontal navigation bar with a black background and white text. The tabs from left to right are: Home, Reference, Secure File Exchange, Alerts Manager, Poll Manager, Applications, and Indirect Purchasing.

RESULTS

You have successfully moved a Portal tab.

Modifying Page Layout

1. On the Manage Pages screen, navigate to page for which you wish to modify the layout.
2. Click **Page**.



3. Select a layout from the available options.
4. Click **Save**.

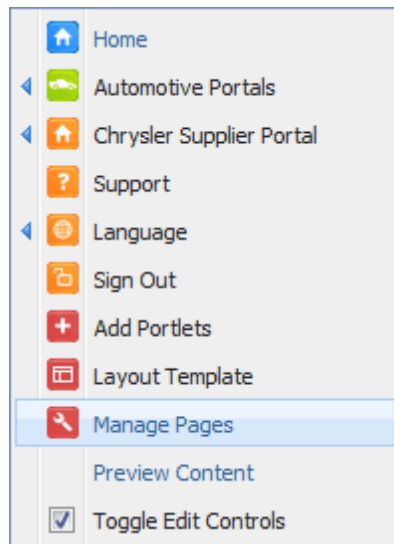
RESULTS

You have successfully modified Page layout.

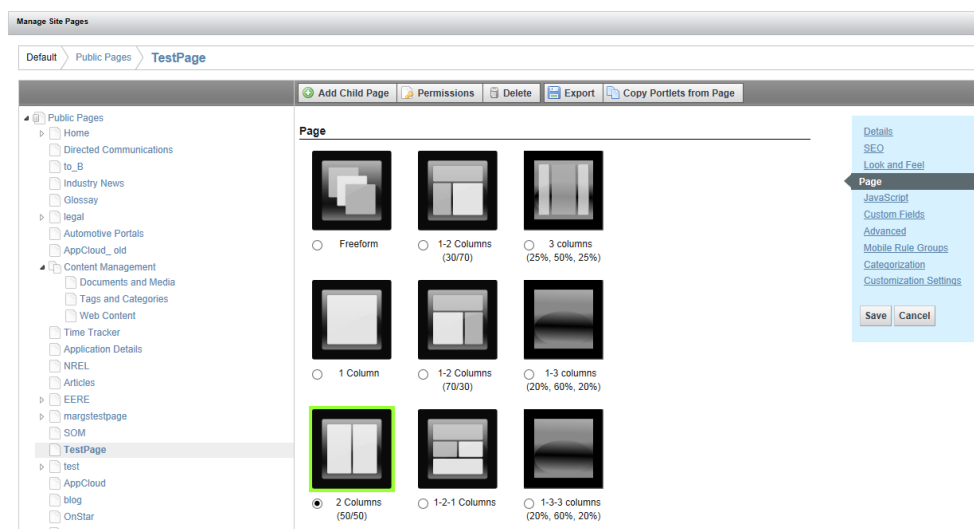
Rearranging Page Layout

Rearranging Page layout changes the way the page is presented to users.

1. From the Welcome menu, click **Layout Template**.



2. Click **Page**.



3. Select a layout from the available options.
4. Click **Save**.

RESULTS

You have successfully changed the layout template.

PORTLETS

Portlet Overview

What is a portlet?

Portlets are small web applications that run in a portion of a web page. The heart of any portal implementation is its portlets, because all of the functionality of a portal resides in its portlets. Covisint's portal core is a portlet container. The container's job is to manage the portal's pages and to aggregate the set of portlets that are to appear on any particular page.

There are many types of portlets available to users of Content Management. Portlets most commonly used by Portal Administrators are defined in Table 1: Portlet Type Definitions. The icons used in the Add Portlets window are described in Illustration 1.

Illustration 1: Icons Used in the Add Portlets Window:



ICON:	DEFINITION:
Blue	indicates a main portlet category
Purple	a non-instanceable portlet, can be added to a community once, and it holds only one set of data
Green	an instanceable portlet, can be added many times to pages in the community

Table 1: Portlet Type Definitions

PORTLET TYPE:	DEFINITION:
Breadcrumb	Breadcrumb navigation portlet shows the location of the current page in context of the site. This form of navigation helps the user visualize the structure of the site and quickly move from a page that is very specific to a broader grouping of information. Simply add the Breadcrumb portlet to each page you want it on. The portlet will determine its place in the structure of the website and dynamically build its proper path.
Documents and Media	Centralized repository for various document types (e.g., PDF, .DOC, .XLS, etc.) to be stored and assigns a unique URL to each of them. A company's intranet using Covisint's Portal can then be able to post internal documentation (e.g., reimbursement forms, charitable donations policies, etc.) for access by its employees. Alternatively, since each document has its own URL, a portlet on your company's public website may display a list of PDF files of quarterly newsletters and their download links. The Document Library supports multiple repositories that can be set with different access roles. Also, the documents in the repository are version-controlled, allowing a user to retrieve particular revision has been stored on the system.
Web Content	An administration portlet that allows the creating, updating, searching, and managing content. The Web Articles Display portlet and the Web Content list portlet are used to display content created through the Web Content portlet. While the Web Content portlet creates all content used in CMS, it is the Web Content Display and Web Content List portlet that actually display content to portal users and guests.
Web Content Display	Allows displaying of a set of contents that satisfy a set of conditions configured through the portlet preferences such as content type and community. The Journal Articles portlet and the Journal Content portlet are used to display content created through the Journal portlet. While the Journal portlet creates all content used in CMS, it is the Journal Articles and Journal Content portlet that actually display content to portal users and guests. The Journal Articles portlet allows a user to be shown articles that have been published within a particular Article Type. This may be Press Releases, Financial Reports, or a Software Version History. As long as there are published articles that can be read, a user can easily access them through the Journal Article portlet.

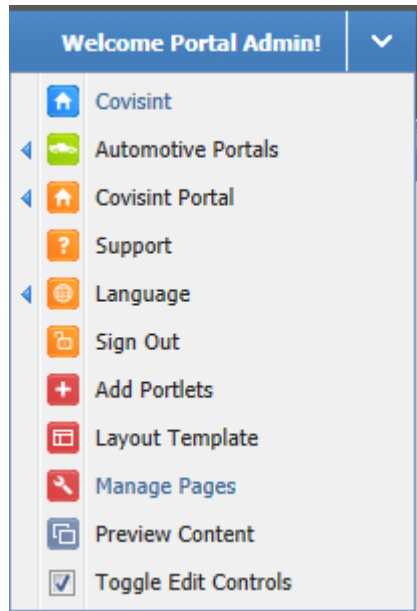
PORTLET TYPE:	DEFINITION:
Web Content List	Allows displaying one or more contents manually selected from the list of available portlets. If more than one content is selected only one at a time will be shown links will be added to allow the user to navigate to the rest of the contents. The Journal Articles portlet and the Journal Content portlet are used to display content created through the Journal portlet. While the Journal portlet creates all content used in CMS, it is the Journal Articles and Journal Content portlet that actually display content to portal users and guests. The Journal Content portlet enables a Journal article to be requested and displayed on the portal page. You can integrate the power of function-rich portlets with the more static information of a Journal article. A company may have an "Investors" page on their website. In one column you may see the Stocks portlet and in another column a Journal Content portlet. The Stocks portlet can display the company's ticker symbol with stock price and the Journal Content portlet can display static content of the latest financial reports. A mortgage company may want to have a Loan Calculator portlet right next to a Journal Content portlet showing an article with current rates and plans.
Web Content Search	Allows users to search for Journal content. the Journal portlet is used to create CMS content and the Journal Articles and Journal Content portlets are used to display those contents. This portlet allows writers to easily edit content displayed on web pages without having to sort through complex code. The Journal Articles portlet and the Journal Content portlet are used to display content created through the Journal portlet. While the Journal portlet creates all content used in Content Management System (CMS), it is the Journal Articles and Journal Content portlet that actually display content to portal users and guests.
Navigation	The Navigation portlet is similar to the Breadcrumb portlet in that it helps the user visualize the structure of the site and provides hyperlinks to quickly move from page to page. The advantage of the Navigation portlet is that it displays more information about the current page.
Polls	The Polls portlet can be added to a community once, and it holds one set of data. In this case, you will be adding poll questions with multiple choice answers. The set of questions belongs to the community as a whole. So if you add the Polls portlet to another page in the community, the same set of questions will be displayed.
Polls Display	Polls Display portlet is different than a Polls portlet.. It can be added many times to pages in the community, and each instance of the portlet can hold a different poll question. So you use the Polls portlet to create questions and the Polls Display portlet to display the questions and allow users to answer the questions in the poll.

RESULTS

You have successfully reviewed an overview of portlets.

Adding a Portlet

1. Navigate to the page on which you wish to add a portlet.



2. From the *Welcome* menu, click **Add Portlets**. The Add Portlets pop up window is displayed.



3. Click **+** next to the category. (This example uses Collaboration).
4. Click **Add** next to the portlet you wish to add. (This example adds the Calendar, but you may add your intended portlet). The portlet is added to your page.



A good rule of thumb is to modify permissions on the newly added portlet so that only you can see the newly added portlet, so that others cannot view / use the portlet until you have it configured properly. Once you have configured the portlet to display as you wish, modify permissions again to allow others to view / use the portlet as appropriate.

5. Optionally, drag and drop the portlet to a different location on the page.
6. Optionally, managing the look and feel of the portlet.



If you have added a Journal Content portlet, the next step is to configure the portlet to display an article.

RESULTS

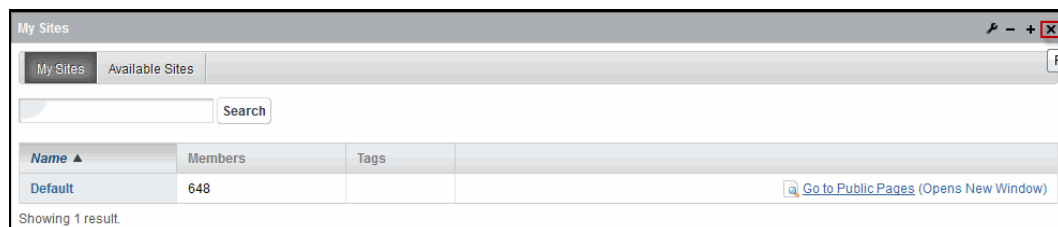
You have successfully added a portlet.


Deleting a Portlet from a Page



Once a portlet is deleted, it is not retrievable. You must create the portlet again if you later decide to display the portlet.

1. Navigate to the portlet you wish to delete.



2. Click  in the upper right corner of the portlet you wish to delete.
3. Click **OK** to confirm deletion.

RESULTS

You have successfully deleted a portlet.

Rearranging Page Layout


1. Click and hold on a portlet title.
2. Drag the portlet to a new location on the page.
3. Release the mouse button.

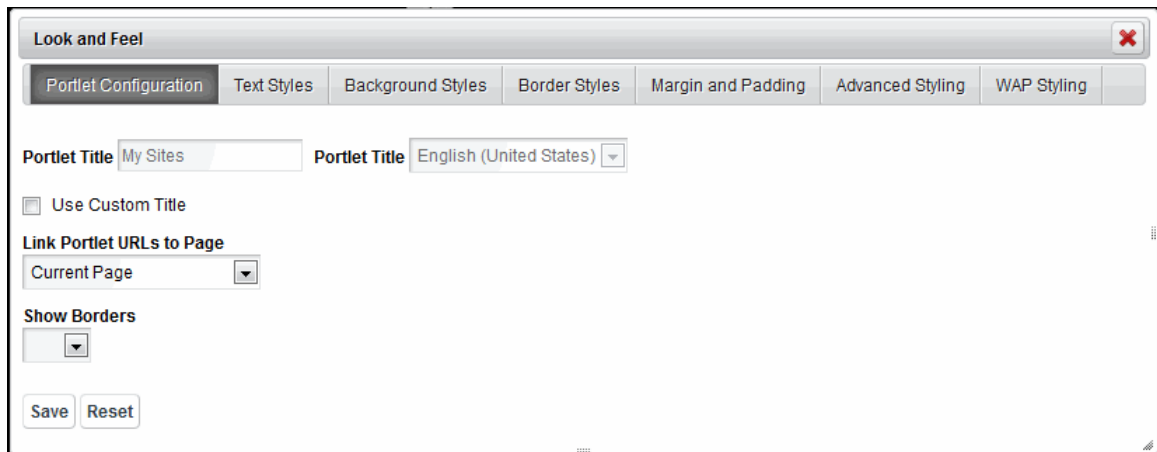
RESULTS

You have successfully rearranged a page layout.

Managing the Look and Feel of a Portlet

Complete the following steps to change the look and feel of a portlet. This example uses the Training Portlet. Changes may include adding a border, changing the background color, font, etc.

1. Navigate to the portlet for which you wish to configure the look and feel. This example uses the My Sites portlet.
2. Click **Options**. 
3. Click **Look and feel**.



4. Perform one or more of the following:


If you wish to change the portlet's...	Then...
text style	<ol style="list-style-type: none"> Click Text Styles. Use the drop down menus to set the style, color, font type, etc. Click Save.
background color	<ol style="list-style-type: none"> Click Background Styles. Select the new color. Click Save.
border	<ol style="list-style-type: none"> Click Border Styles. Use the drop down menus to select the border width, style, and color. Click Save.
margin and/or padding	<ol style="list-style-type: none"> Click Margin and Padding. Use the drop down menus to select the spacing. Click Save.

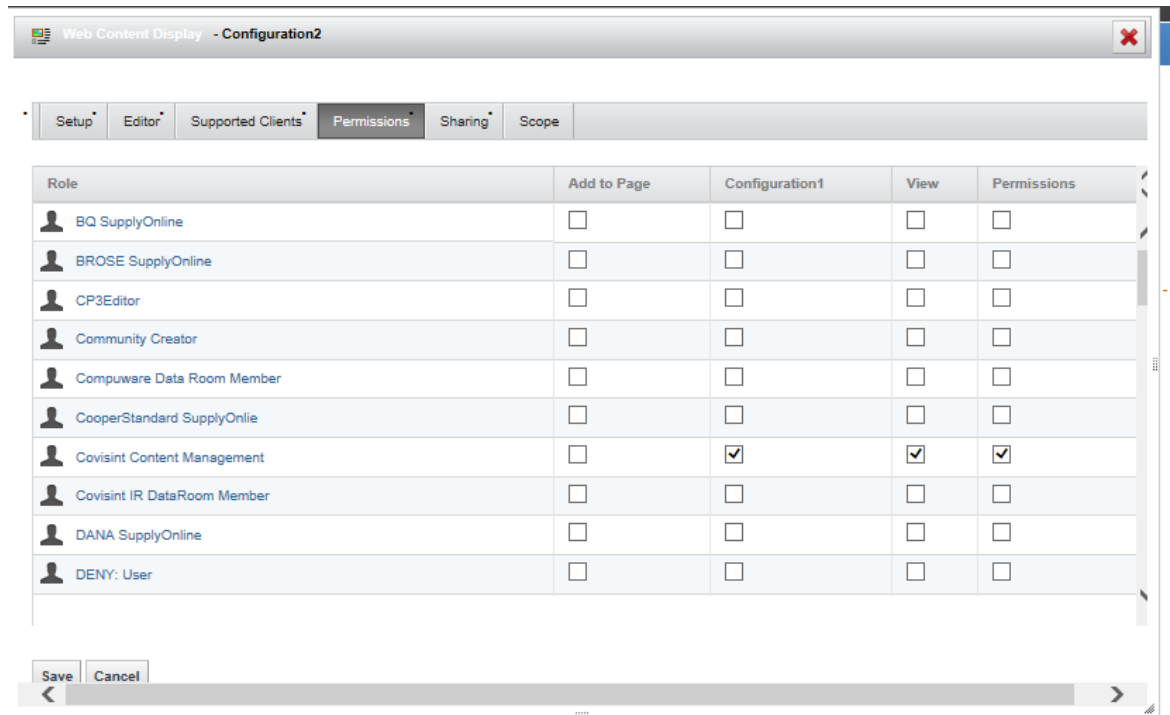
If you wish to change the portlet's...	Then...
style sheet of the portlet	<ol style="list-style-type: none">Click Advanced Styling.Determine if this CSS will apply only to this portlet, or all portlets like it by clicking the corresponding link.Add the CSS in the open text field.Click Save.

RESULTS

You have successfully managed the look and feel of a portlet.

Modifying Portlet Permissions

1. Navigate to the portlet for which you wish to modify permissions.
2. Click  (the configuration icon).
3. Click **Permissions** tab.



Role	Add to Page	Configuration1	View	Permissions
BQ SupplyOnline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BROSE SupplyOnline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CP3Editor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community Creator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compuware Data Room Member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CooperStandard SupplyOnline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Covisint Content Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Covisint IR DataRoom Member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DANA SupplyOnline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DENY: User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Modify permissions as desired. For example:
 - a. Click Guest to display this portlet to non-logged in users.
 - b. Click User to display this portlet to logged in users.
5. Click **Save**. The screen refreshes portlet permissions are updated..





When adding a portlet to a page, you may wish to remove all 'view' permissions except for owner. By doing so, only you can see the newly added portlet, preventing others from viewing / using the portlet until you have it configured properly. Once you have configured the portlet to display as you wish, modify permissions again to allow others to view / use the portlet as appropriate.

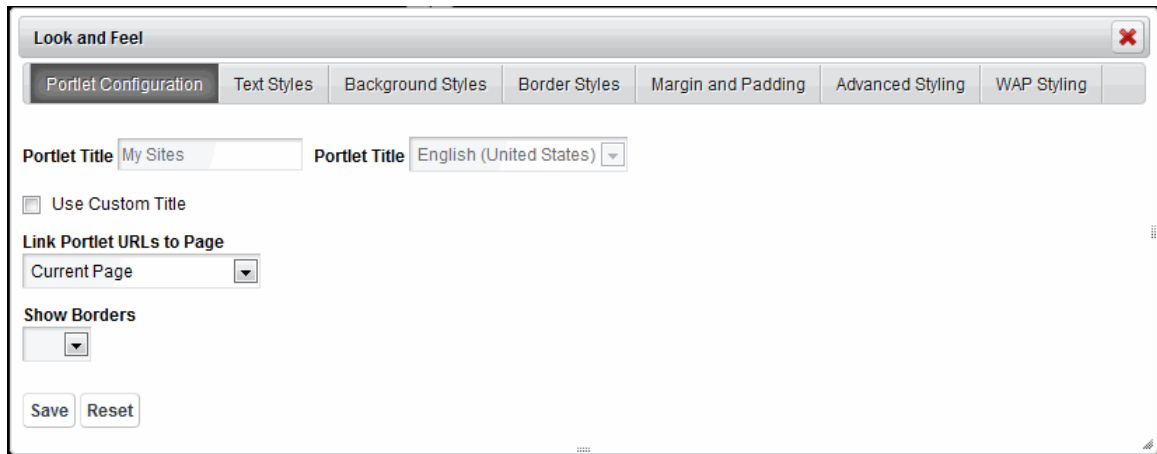
RESULTS

You have successfully modified portlet permissions.

Renaming a Portlet Title on Your Page

1. Navigate to the portlet you wish to rename. (Contact Us, in this example).

2. Click **Options** .
3. Click  (the 'look and feel' icon). The Configuration pop up box is displayed.



The image shows a 'Look and Feel' configuration dialog box. It has a title bar with a close button (X). Below the title bar is a tabbed interface with the following tabs: 'Portlet Configuration' (selected), 'Text Styles', 'Background Styles', 'Border Styles', 'Margin and Padding', 'Advanced Styling', and 'WAP Styling'. The 'Portlet Configuration' tab contains the following fields and controls:

- Portlet Title**: A text input field containing 'My Sites'.
- Portlet Title**: A dropdown menu showing 'English (United States)'.
- ☐ **Use Custom Title**
- Link Portlet URLs to Page**: A dropdown menu showing 'Current Page'.
- Show Borders**: A dropdown menu showing a small icon.
- Save** and **Reset** buttons at the bottom.

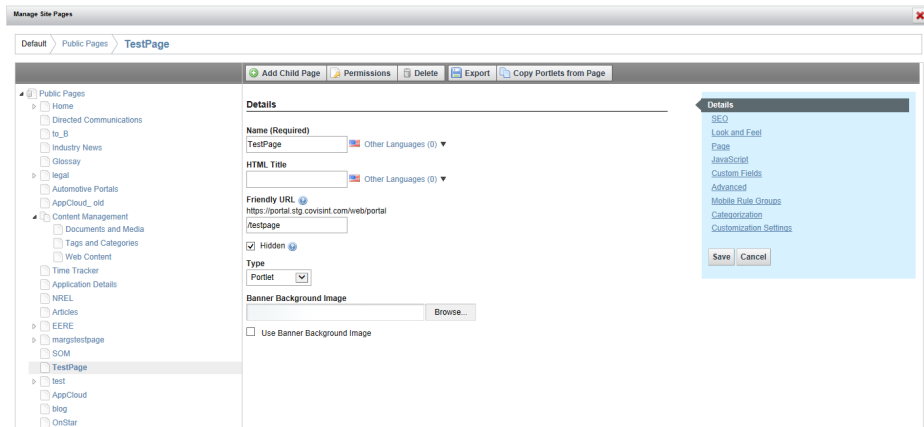
4. In the Portlet Title field, key in the new name for the portlet.
5. Click **Save**.

RESULTS

You have successfully renamed a portlet title on your page.

Resorting the Display Order of Child Pages

1. Click **Manage Pages** link from the Welcome menu in the upper right corner of the screen. The Manage Pages screen is displayed. Child pages are displayed in left tree navigation.



2. Navigate to the page you wish to manage by clicking on it in the left menu of pages.
3. Click the page name. Drag the page to the desired location.
4. Click **Save**.

RESULTS

You have successfully resorted the display order of child pages (menu options).

Using Asset Publisher

Asset Publisher Portlet Overview

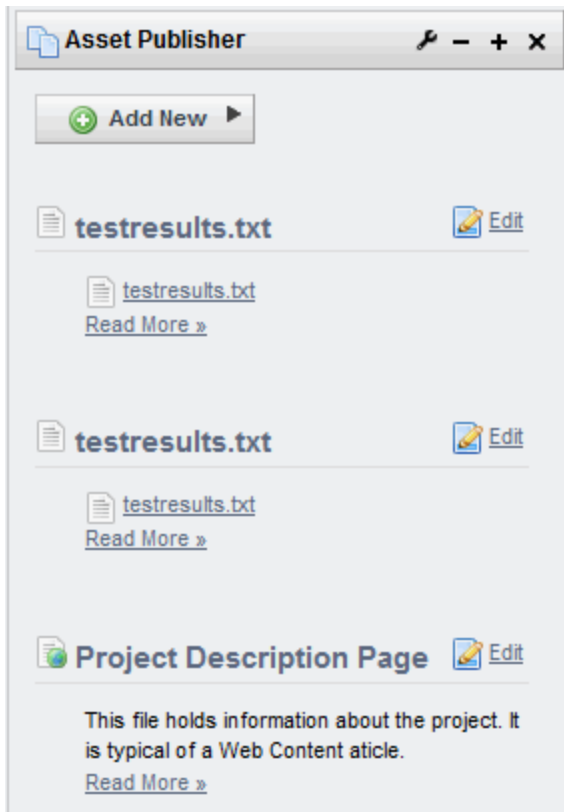
The Asset Publisher is a very flexible tool to publish many types of content. It allows showing lists of web content, blog entries, images, documents, bookmarks, wiki pages, etc. Each element of the list might be shown as a title, summary, or in full detail.

The Asset Publisher portlet enables users to create 100% dynamic pages. All of the content on a page can be driven by Categories and Tags (taxonomy and folksonomy) significantly reducing the burden on content administrators to maintaining web pages and micro sites.

Additional Asset Publisher capabilities include:

- It works with Categories Navigation portlet to allow users to interact with dynamic pages to instantly refine the content on a page with one click.
- Interacts with Search portlet and Search portlet facets to deliver multi-dimensional search results pages.
- Can be used to customize the look and feel of a page dynamically by adding CSS or JavaScript on-the-fly.
- Users are able to categorize and or tag a page and or a site.
- Users are able to view assets on the Asset Publisher portlet based on their user profile once they log in. The assets viewed by a particular user are categorized by categories grouped under Global Vocabularies also categorizing his/her profile thereby enabling the user to view those assets after logging in and navigating to a page with an Asset Publisher.
- Personalization which operates based on portal taxonomy.
- Dynamic pages that “listen” for a site visitor’s categories then serve up content relevant to the user.
- Content is also configurable to be relevant to the context of the page.
- Functionality provides query less search results – list of assets the user is likely to be interested in based on the categorization of the user, the assets, and the context of the page.

Asset Publisher allows you to click an asset to see it in full detail, or provides links to the original content in the Portal.



Asset Publisher can now be configured to display three additional assets: Page, Site, and User.

Asset Publisher - Configuration

SetupPermissionsCommunicationSharing

Asset Selection

Dynamic

Source

Scope

Select More Than One...

Selected

Available

A1-Test Site 2
Alice_Site_AllowEnable
Auto_Site_CMS_6_live_1
Auto_Site_CMS_72_live_2
Auto_Site_CMS_74_staging
Auto_Site_FS_staging
Blank
Blank Site - Don't Change
Blank Site 2 - Don't Change
Comm_test

Asset Type

User

Any
Select More Than One...

Asset Type
Wiki Page
Calendar Event
Bookmarks Entry
Message Boards Message
Documents and Media Document
Web Content
User
Blogs Entry
Site
Page

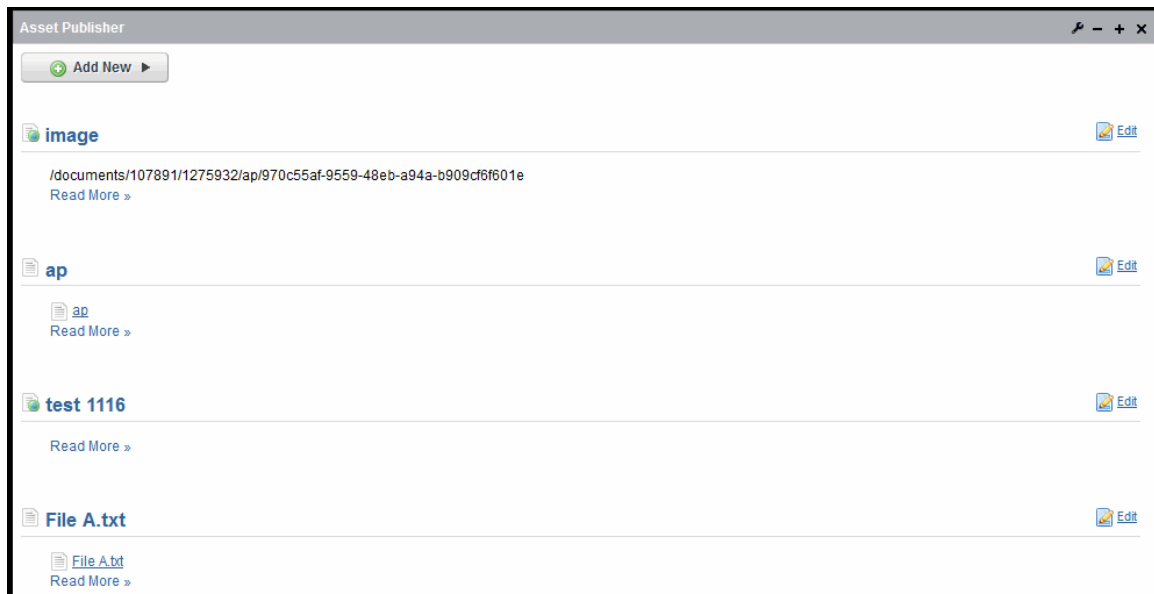
fields

Available

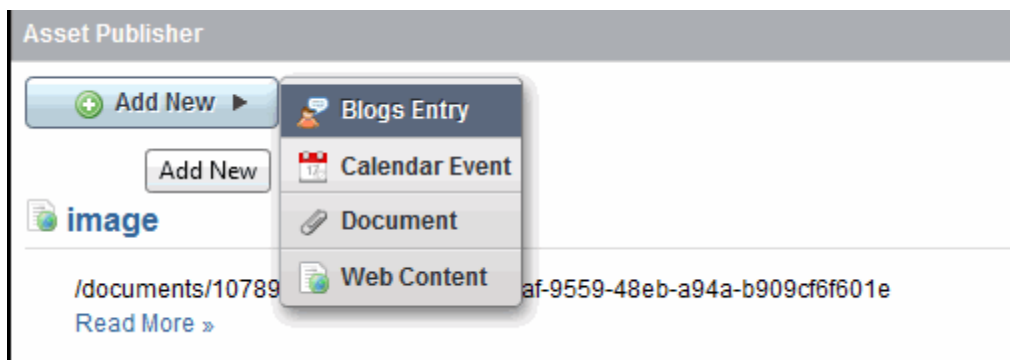
Areas of Interest
Author
Banner Name
Business Goal

Process for Using the Asset Publisher Portlet

The screen shot below is an example of what can be produced via the Asset Publisher Portlet. Complete the steps below to select content for the portlet.



1. Click **Add New**.



2. Select content type. In this example, Web Content is used.
3. Enter a title for the content.

Web Content

New Web Content

« Back

Structure: Default Template: None

Default Language: English (United States) [Change](#)

Title (Required)

Content

Content

- [Abstract](#)
- [Categorization](#)
- [Schedule](#)
- [Display Page](#)
- [Related Assets](#)
- [Permissions](#)
- [Custom Fields](#)

Save as Draft Publish Cancel

4. Use the editor to create the content.
5. Click **Publish**.

RESULTS

You have successfully added content using the Asset Publisher Portlet.

Configuring the Asset Publisher Portlet

After creating pages upon which the Asset Publisher Portlet is displayed, configure the Asset Publisher to display the correct categorized content for each of the pages.

1. Click **Options**, then select **Configure** in the Asset Publisher portlet.
2. Choose **Web Content** for Asset Type.
3. Select appropriate filter settings.

The screenshot shows a 'Filter' configuration window. At the top, it says 'Displayed assets must match these rules.' Below this, there are three dropdown menus: 'Contains', 'Any', and 'of the following', followed by a 'Tags' dropdown. A large empty text box is provided for input. Below the text box are two buttons: '+ Add' and 'Select'. At the bottom right, there are two small buttons: a green '+' and a red '-'. Below the main configuration area, there are three checkboxes with labels: 'Show only assets with Tags and Categories as its display page.', 'Include tags specified in the URL?' (which is checked), and 'Include tags set by other applications?'.

4. Select the Display Style from the drop down menu.
5. Configure other Display options using the drop down menus and checkboxes.

Display Settings

Display Style
 Abstracts

Abstract Length
 200

Asset Link Behavior
 Show Full Content

Maximum Items to Display
 20 results

Pagination Type
 None

☐ Exclude Assets with 0 Views

☒ Show Metadata Descriptions

☐ Show Available Locales

☐ Set as the Default Asset Publisher for This Page

Enable Conversion To

☐ Microsoft Word (.doc)
 ☐ ODT
 ☐ Adobe PDF (.pdf)
 ☐ Rich Text Format (.rtf)
 ☐ SXW
 ☐ TXT

☐ Enable Print
☐ Enable Flags
☐ Enable Permissions
☒ Enable Related Assets
☐ Enable Ratings
☐ Enable Comments
☐ Enable Comment Ratings

6. Use drop down menus to select ordering and grouping settings.

Ordering and Grouping

Order by Modified Date Descending

And Then By Title Ascending

Group by

7. When configured as desired, click **Save**.

RESULTS

You have successfully configured the Asset Publisher Portlet.

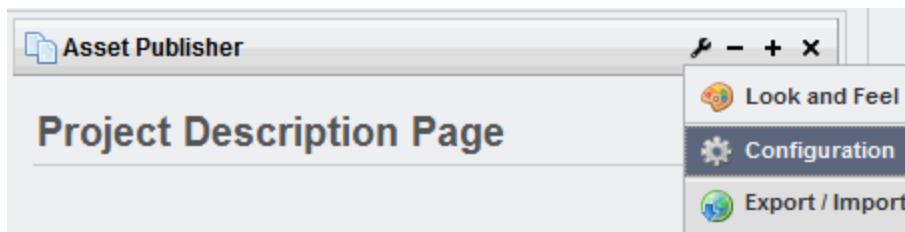
Configuring the Related Assets Portlet

Configure the Related Assets Portlet to display links to related content.



As part of the Related Assets Portlet configuration, settings are modified in the Asset Publisher Portlet.

1. Navigate to the Site page to add the Portlet.
2. Click **Add**.
3. Select **More....**
4. Expand Content Management.
5. In the Related Assets row, select **Add**.
6. Drag the Portlet to the desired area of the page.
7. Navigate to the Asset Publisher Portlet.
8. Click **Options > Configuration**.



9. Under Display settings, select:
 - Asset Link Behavior: View in a Specific Portlet
 - Clear Enable Related Assets checkbox

Display Settings

Display Style
Title List ▼

Asset Link Behavior
View in a Specific Portlet ▼

Maximum Items to Display
20 ▼

Pagination Type
None ▼

☐ Exclude Assets with 0 Views

☒ Show Metadata Descriptions ?

☐ Show Available Locales

☐ Set as the Default Asset Publisher for This Page ?

Enable Conversion To ?
DOC ☐ ODT ☐ PDF ☐ RTF ☐ SXW ☐ TXT ☐

☐ Enable Print

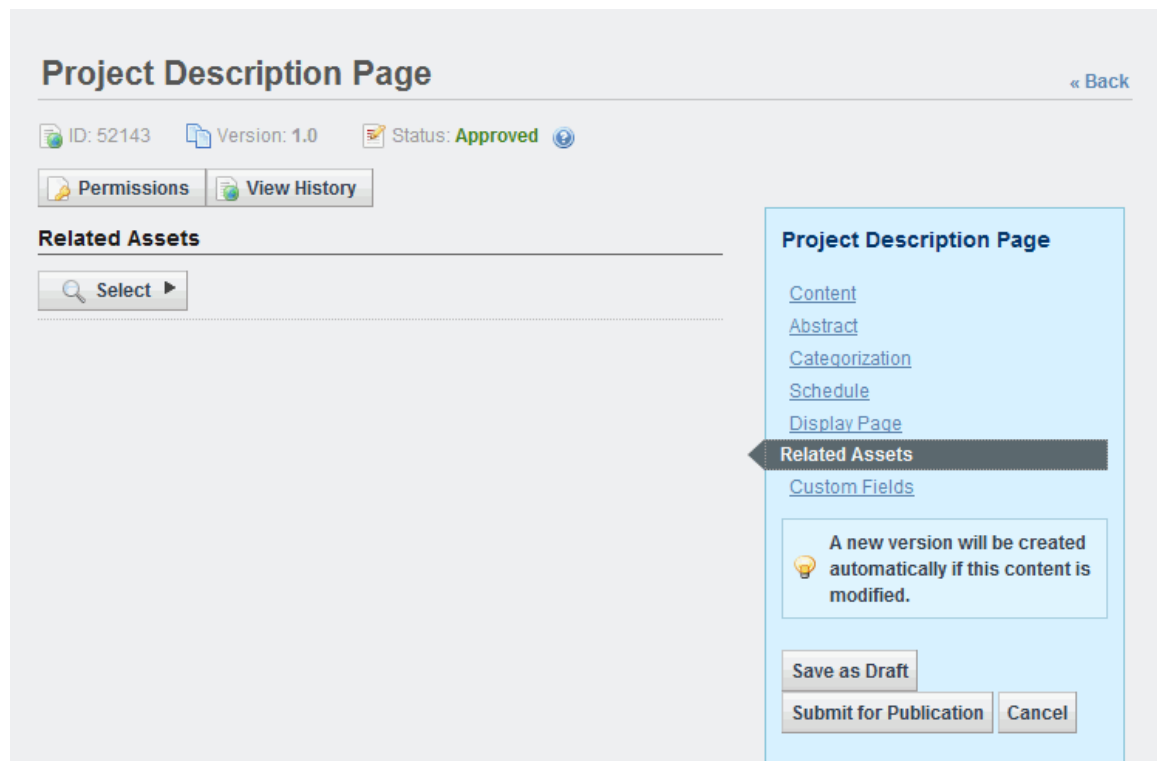
☐ Enable Flags

☒ Enable Permissions

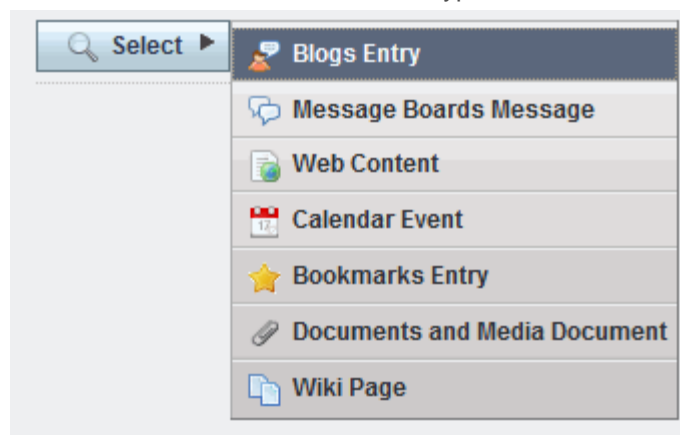
☐ Enable Related Assets

☐ Enable Ratings

10. Navigate to any content in the Portal, then click the **Related Assets** tab to group content.



11. Click **Select**.
12. From the list, select the content type.



13. In the Asset Browser, select the related content.
14. Click **Save**.

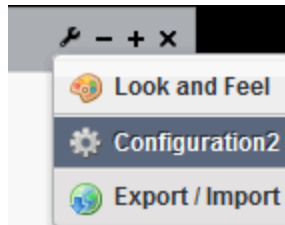
RESULTS

You have successfully configured the Asset Publisher and Related Assets Portlets to show related content.

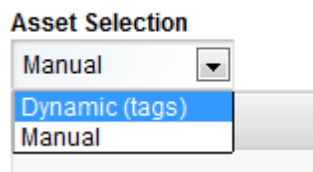
Selecting Assets Dynamically

Select Dynamic in Asset Publisher configuration to select content to display dynamically. Note that users are able to view assets on Asset Publisher based on their user profile once they log in.

1. Navigate to the Asset Publisher Portlet.
2. Click **Options > Configuration2**.



3. From Asset Selection, Select **Dynamic (tags)**.



4. Select rules for displaying dynamic content:

Value	Information
Asset Selection Dynamic ▼	Manual - Manually configure content to appear in Asset Publisher Dynamic - Configure parameters to dynamically display content in Asset Publisher
Source	
Scope Default ▼	Global - Include all files in the site Default - Include files from a specified area on the site More than one - Include files from multiple locations on the site
Asset Type Any ▼ Any Select More Than One... Asset Type Page Web Content Blogs Entry Site Discussion Forums Message Wiki Page Documents and Media Document Calendar Event Bookmarks Entry User	Web Content Blogs Entry Message Board Message Wiki Page Documents and Media Document Calendar Event Bookmarks Entry User Site Page

Value	Information
Filter	
<p>Displayed assets must match these rules.</p> <p>Contains <input type="text"/> Any <input type="text"/> of the following Tags <input type="text"/></p> <p><input type="button" value="Add"/> <input type="button" value="Select"/></p>	<p>Use the drop-downs to configure an appropriate condition string. Click Add. Use +/- to edit the conditions list.</p>
<input type="checkbox"/> Show only assets with Content Management as its display page	Select this option to display assets tagged as content management
<input checked="" type="checkbox"/> Include tags specified in the URL?	Select this option to include tags found in the content URL
<input type="checkbox"/> Include tags set by other applications? ⓘ	Select this option to include tags set by other applications (ex: MS Word)
Custom User Attributes	
<p>Custom User Attributes</p> <p>Displayed assets must match these custom user profile attributes ⓘ</p> <p><input type="text"/></p>	<p>Specifying the custom user attributes will retrieve assets that have matching categorization. Categories must be from the global context</p>
Ordering and Grouping	
<p>Order by <input type="text" value="Modified Date"/> <input type="text" value="Descending"/></p>	Select the Order by the criteria Title, Create Date, Modified Date, Publish Date, Expiration Date, Priority, View Count, or Ratings. Criteria is displayed in Ascending or Descending order
<p>And Then By <input type="text" value="Title"/> <input type="text" value="Ascending"/></p>	Select the secondary order by the criteria Title, Create Date, Modified Date, Publish Date, Expiration Date, Priority, View Count, or Ratings. Criteria is displayed in Ascending or Descending order
<p>Group by <input type="text"/></p>	Select the Asset grouping by Asset Types, Vocabularies, or Global Vocabularies
Display Settings	
<p>Display Style</p> <p><input type="text" value="Abstracts"/></p>	Select the way the Assets will be displayed. Available options are table, table list, abstracts, or full content
<p>Abstract Length ⓘ</p> <p><input type="text" value="200"/></p>	Select the number of words the abstract summary will contain
<p>Asset Link Behavior</p> <p><input type="text" value="Show Full Content"/></p>	Select to Display the full content in the Asset Publisher or link the content to another portlet

Value	Information
Maximum Items to Display 20 ▼	Set the maximum number of assets to display in the portlet window
Pagination Type None ▼	Choose the way that large sets of data will be displayed across pages. Options are None, Simple, and Regular
<input type="checkbox"/> Exclude Assets with 0 Views	Select this option to exclude and assets with a zero view count
<input type="checkbox"/> Show Metadata Descriptions ⓘ	Such as <i>Content Related to ..</i> or <i>Content with tag ...</i>
<input type="checkbox"/> Show Available Locales	Select this option to show available content locales (if any exist)
<input type="checkbox"/> Set as the Default Asset Publisher for This Page ⓘ	The default asset publisher will be used to display web content associated to this page.
Enable Conversion To ⓘ Microsoft Word (.doc) <input type="checkbox"/> ODT <input type="checkbox"/> Adobe PDF (.pdf) <input type="checkbox"/> Rich Text Format (.rtf) <input type="checkbox"/> SXW <input type="checkbox"/> TXT <input type="checkbox"/>	Enabling Open Office integration provides document conversion functionality.
<input type="checkbox"/> Enable Print	Select this option to enable printing documents from the Asset Publisher
<input type="checkbox"/> Enable Flags	Select this option to enable Flags
<input checked="" type="checkbox"/> Enable Permissions	Select this option to enable permission to be applied to content in the Asset Publisher
<input type="checkbox"/> Enable Related Assets	Select this option to
<input type="checkbox"/> Enable Ratings	Select this option to enable rating for the content
<input type="checkbox"/> Enable Comments	Select this option to enable comments for the content
<input type="checkbox"/> Enable Comment Ratings	Select this option to enable comment ratings
<input type="checkbox"/> Enable Social Bookmarks	Select this option to enable social bookmarks
Show Metadata	

Value	Information
<p>Metadata Fields</p> <div> <div>Current</div> <div>Available</div> <div> <div> <div>→</div> <div>←</div> </div> <div> <div>↑</div> <div>↓</div> </div> </div> </div> <p>Use the arrow keys to select metadata fields. Select a field from the Available column and click the left arrow. To remove a field, select it from the Current column and click the right arrow.</p>	<p>Author</p> <p>Categories</p> <p>Create Date</p> <p>Expiration Date</p> <p>Modified Date</p> <p>Priority</p> <p>Publish Date</p> <p>Tags</p> <p>View Count</p>
RSS	
<input type="checkbox"/> Enable RSS Subscription	Select this option to enable RSS subscriptions

5. Click **Save**.

RESULTS

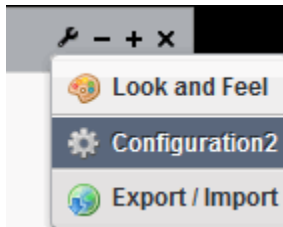
You have successfully selected Asset Publisher content dynamically.

Selecting Enhanced Display Types

Enhanced Display Types of Asset Publisher display assets so that users can quickly screen the content for the right document, eliminating wasted time from repeatedly opening documents until the correct one is found.

Complete the following steps in Asset Publisher configuration to display Enhanced Display Style. It supports 3 type display styles – News Read, Slide Show and Grid View.

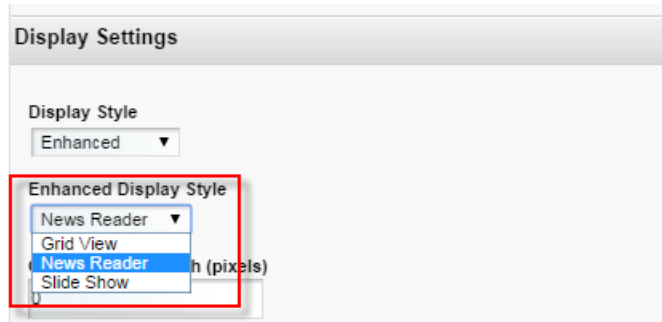
3. Navigate to the Asset Publisher Portlet.
4. Click **Options > Configuration2**.



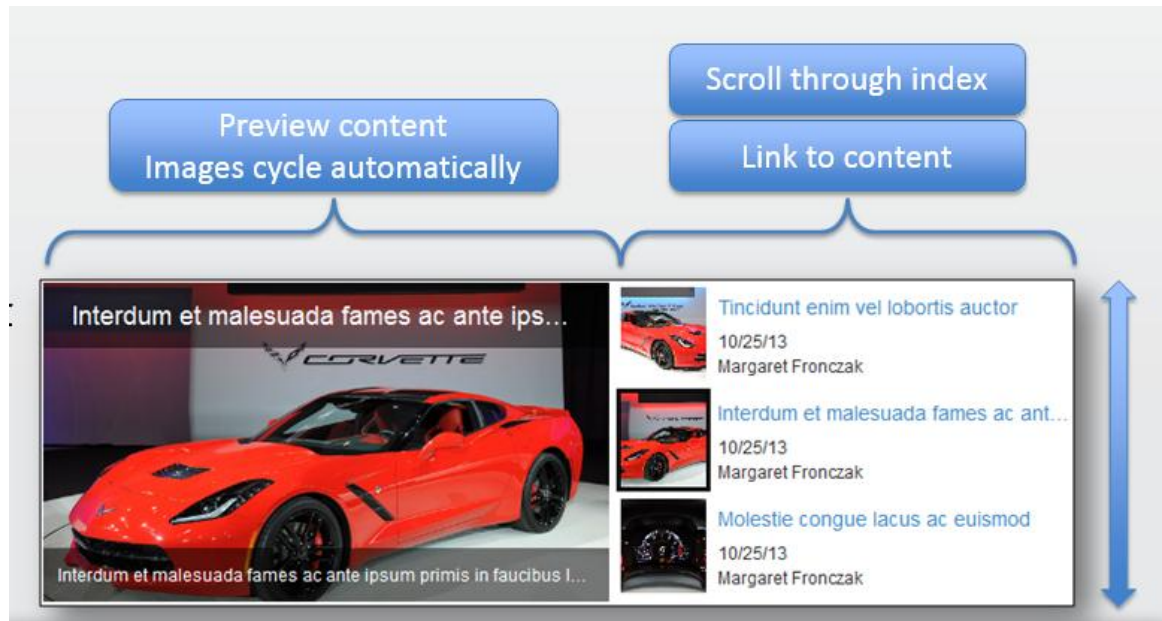
5. From Display Setting Selection>Display Style, Select Enhanced.

A screenshot of the 'Asset Publisher-News Reader - Configuration2' dialog box. The 'Setup' tab is selected. Under 'Asset Selection', there are several expandable sections: 'Source', 'Custom Meta Data Filter', 'Filter', 'Custom User Attributes', 'User Personalization', and 'Ordering and Grouping'. The 'Display Settings' section is expanded, showing 'Display Style' set to 'Enhanced' (highlighted with a red box), 'Enhanced Display Style' set to 'News Reader', 'Container max width (pixels)' set to '0', and a checked checkbox for 'Automatically play slides?'. There are also tabs for 'Permissions', 'Communication', and 'Sharing' at the top, and an 'Archive/Restore Setup' link on the right.

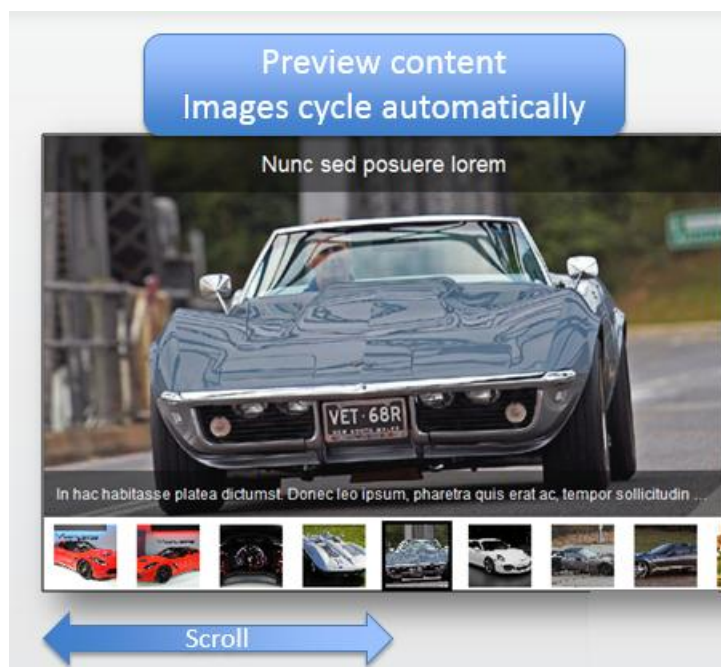
6. Select a display style in Enhanced Display Style you wish asset publish displaying.



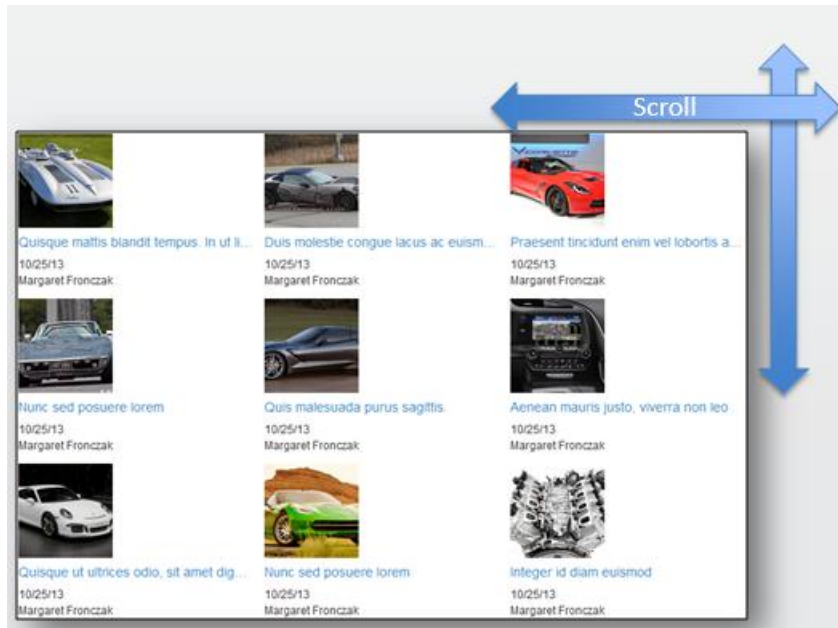
News Reader



Slide Show



Grid View



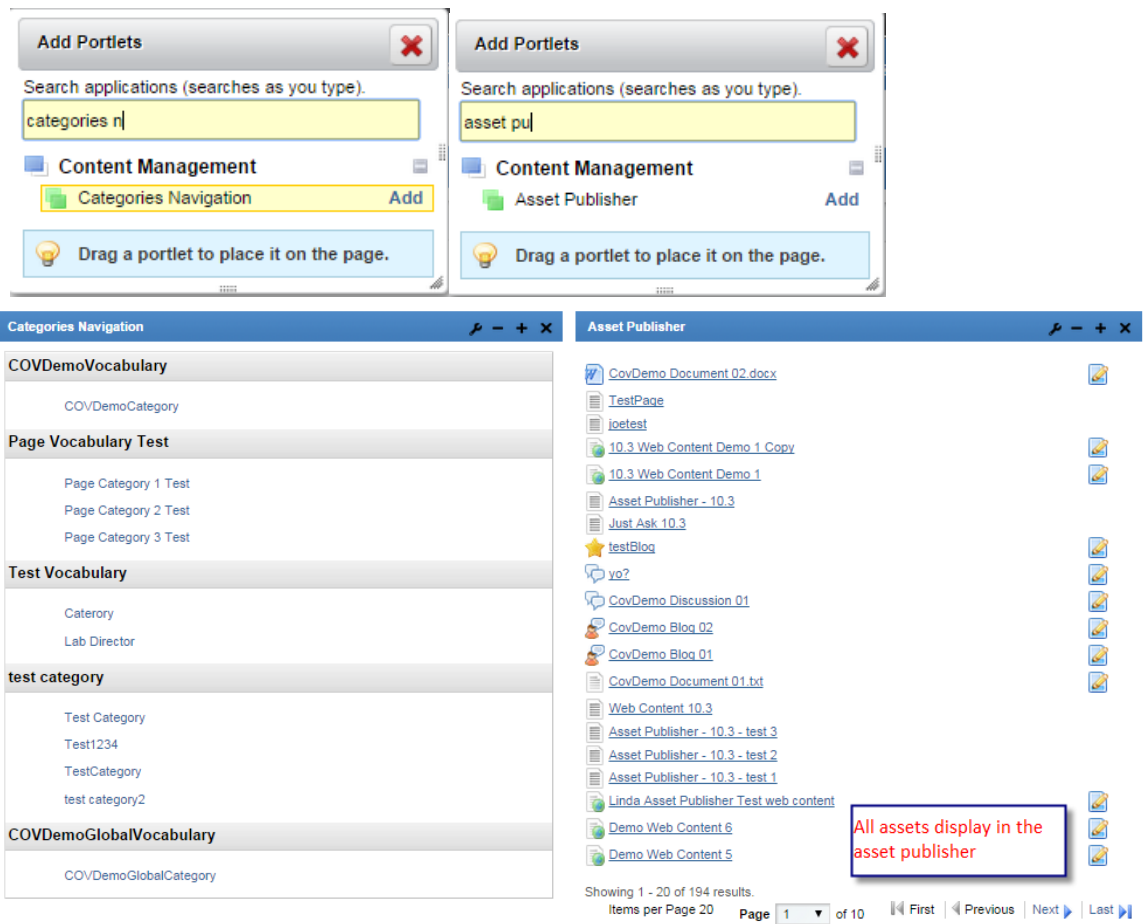
RESULTS

You have successfully configured asset publisher as News Reader or Slide Show or Grid View displaying.

Categories Navigation Interaction

Asset Publisher works with Categories Navigation portlet to allow users to interact with dynamic pages to instantly refine the content on a page with one click.

1. Navigate to the page on which you wish to add the Categories Navigation portlet and the asset publisher portlet.
2. From the welcome menu, click **Add portlets**. The Add Portlets menu is displayed.
3. Input application name into Search applications (searches as you type). The Categories Navigation portlet and the asset publisher portlet are added to the page.



4. Select a category from categories navigation portlet and click this category. Selected Category is highlighted with bold font in Categories Navigation portlet, and only assets which are categorized with selected Category are displayed in Asset Publisher portlet.

Managing the Documents and Media Library

Categories Navigation

COVDemoVocabulary

COVDemoCategory

Page Vocabulary Test

Page Category 1 Test

Page Category 2 Test

Page Category 3 Test

Test Vocabulary

Category

Lab Director

test category

Test Category

Test1234

TestCategory

test category2

COVDemoGlobalVocabulary

COVDemoGlobalCategory

Asset Publisher

CovDemo_Document 02.docx

TestPage

Demo Web Content 6

Demo Web Content 5

Demo Web Content 4

Demo Web Content 3

Demo Web Content 2

Demo Web Content 1

Only assets which are categorized with selected Category are displayed

Using Just Ask Portlet

Just Ask Portlet Overview

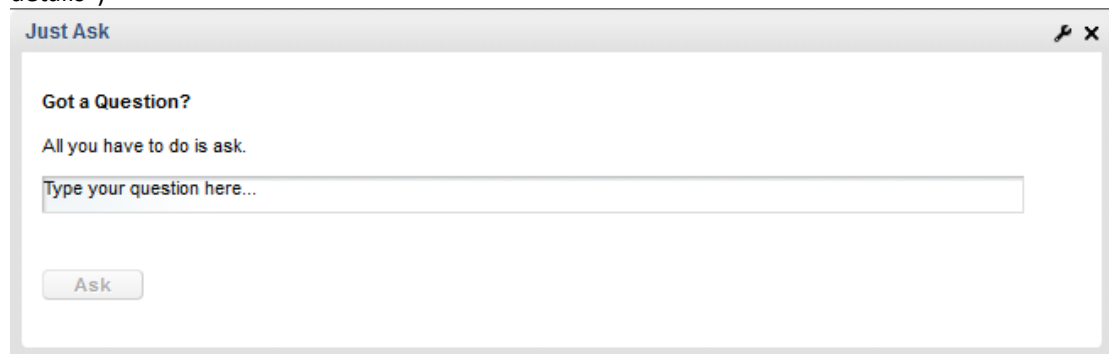
The “Just Ask” portlet is a smart forum (Message Board Portlet), where an end user can ask questions without leaving the current page and no time wasted searching for the correct forum. Each question submitted by a user will be posted as a distinct thread under specific category in Message Boards portlet. Category subscribers are automatically notified of pending question. The question submitter is automatically subscribed to the response and will receive the answer via email. Optionally, the end user could change the subscription frequency as daily digest or notification. For notification, end user can also set priorities (Normal, High). By default the priority set is normal unless user changes it.

A few more details for the Site Admin regarding “Just Ask”:

- The portlet is instanceable - Site Admin is able to drop multiple Just Ask portlets on a page for different categories.
- Guest by default will not have view access to the portlet.

Add and Configure Just Ask Portlet

1. Add the Just Ask portlet to page. (Refer to the section titled “Adding a Portlet for further details”)

A screenshot of the 'Just Ask' portlet interface. The portlet has a title bar with the text 'Just Ask' and a close button. Below the title bar, the text 'Got a Question?' is displayed. Underneath, it says 'All you have to do is ask.' followed by a text input field with the placeholder text 'Type your question here...'. At the bottom of the portlet, there is an 'Ask' button.

2. Configure the portlet, defining where the question will be directed to. The Title and Description are configurable, too.
3. Select a site and then select an existing Message Boards Category in this site.

Managing the Documents and Media Library

Just Ask - Configuration2

Setup Permissions Sharing

[Archive/Restore Setup](#)

Form Information

Title
Got a Question? Other Languages (8) ▼

Description
All you have to do is ask. Other Languages (8) ▼

Select a Site
Default ▼

Select Category
CovTestCategory ▼

Save

RESULTS

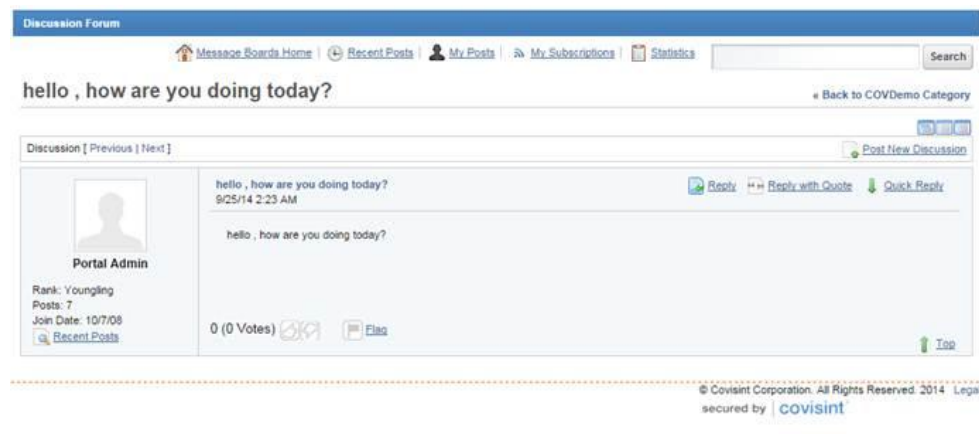
You have added and configured the Just Ask portlet.

Managing User Questions

One or more users who handle the questions can subscribe to the Category on the Message Board. Once a question associated to the Category is submitted via "Just ASK" portlet the subscribers will be notified via email. (For more details, please refer to Using Subscriptions section).

Reply to the message via the Just Ask portlet, the poster of the question will receive the direct reply.

1. From the email alert, click **View Page** link. The Detail Discussion Forum is displayed.
2. Click **Reply**, then respond to the question. The response is posted to the Discussion Forum.



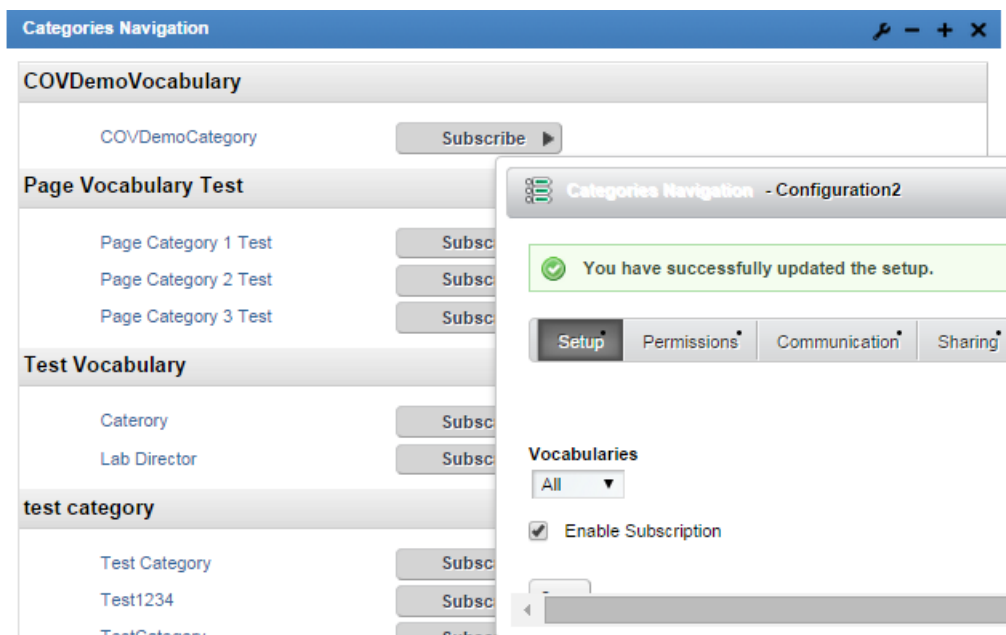
USING SUBSCRIPTIONS

Subscriptions Overview

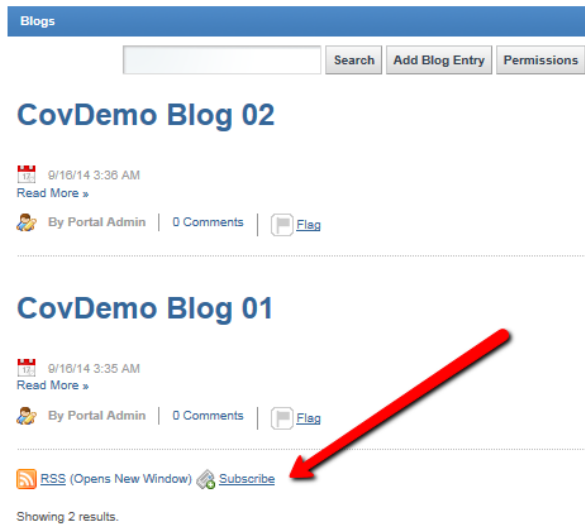
The Subscription feature allows users subscribe to content via RSS Feeds. Users are able to subscribe to various asset types such as:

- categories
- documents
- folders
- blogs
- wikis
- message board.

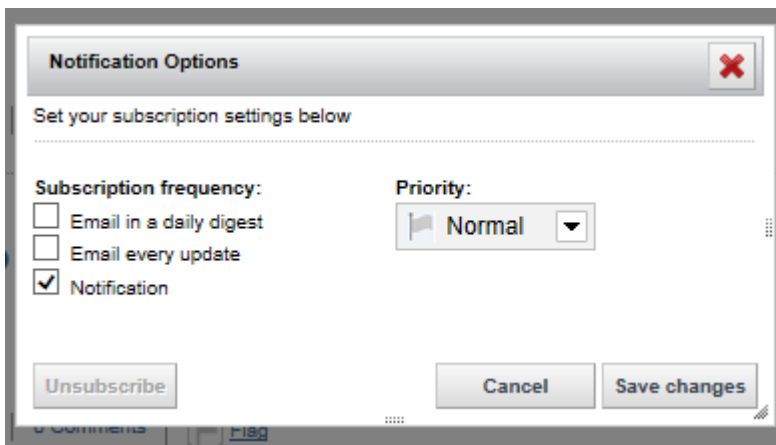
When a user subscribes to an asset, the user will be able to receive email notification when contents of those assets are added or modified. Note that the Subscription button is not available on the Categories and Navigation portlet by default. It has to be enabled on the configuration page of the portlet to allow users to be able to subscribe to categories.



Subscribing to any asset type automatically includes comments associated to that asset. Note that users are able to subscribe to the comments associated to blogs only if they are subscribed to the category categorizing that blog.



Once a user subscribes to an asset, the users are able to modify subscription frequency as follows:

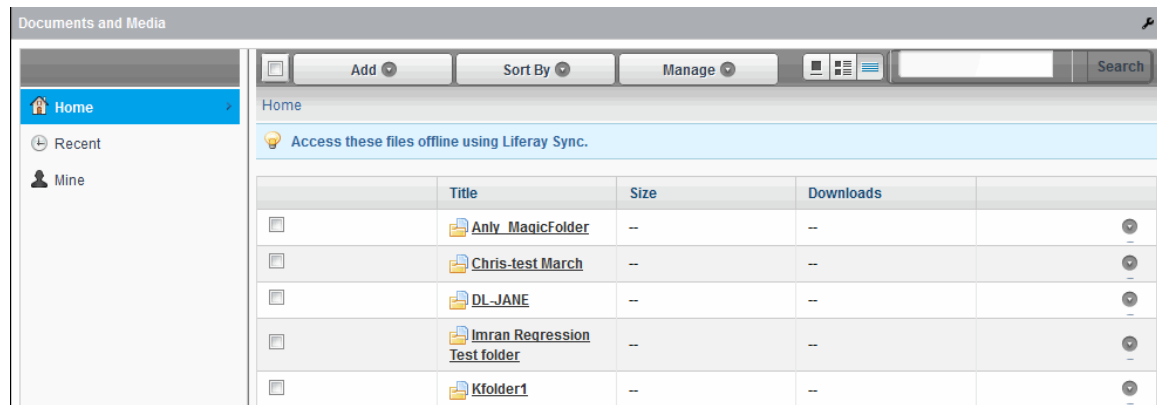


- Daily Digest sent out every 24 hours
- Instant email notification (Email every update)
- In portal notification on the Notification portlet (Notification). Note that if a user selects this frequency while subscribing to any asset type, the user will receive all the notifications on the notification portlet which the user will view only when they are logged into the portal and navigate to a page with the portlet.

MANAGING THE 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.



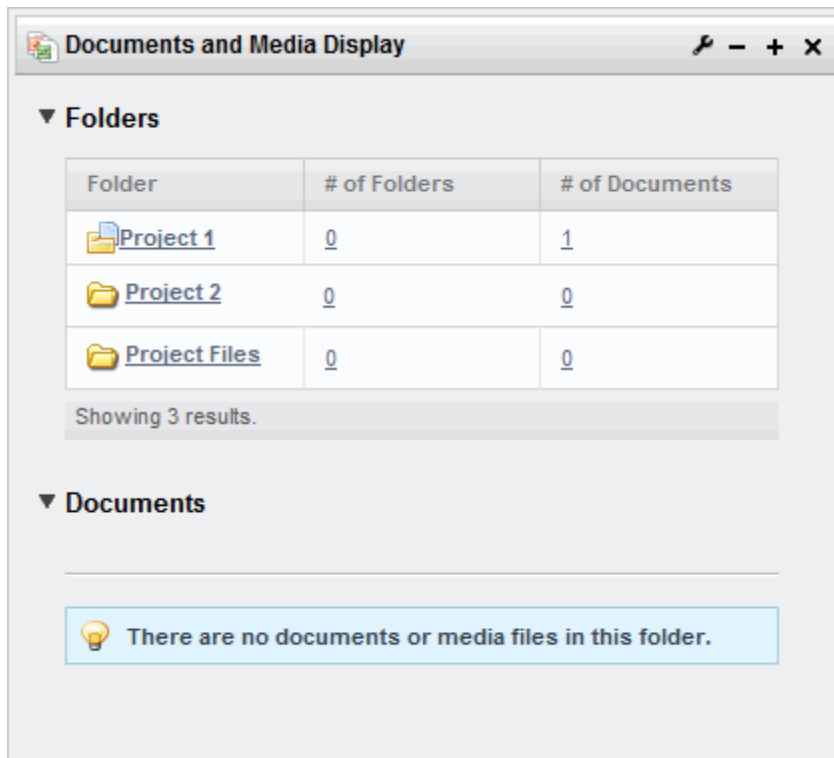
The screenshot displays the 'Documents and Media' portlet interface. On the left is a sidebar with navigation links: 'Home' (selected), 'Recent', and 'Mine'. The main area shows a 'Home' view with a toolbar containing 'Add', 'Sort By', 'Manage', and a search bar. Below the toolbar is a message: 'Access these files offline using Liferay Sync.' A table lists the following items:

	Title	Size	Downloads	
	Anly MagicFolder	--	--	
	Chris-test March	--	--	
	DL-JANE	--	--	
	Imran Regression Test folder	--	--	
	Kfolder1	--	--	




Modifying Which Folders are Displayed in Documents and Media Display Portlet

In the screen example below, the library portlet currently displays the contents of the root folder. After completing the following steps, this Documents and Media Display portlet will use the Project Files folder (and its subfolders) as the default home folder for the library. Users are still able to navigate throughout the entire folder structure to which they have access by clicking on the top level called "Folders".

WHAT IT LOOKS LIKE NOW:




The screenshot shows a web application window titled "Documents and Media Display". It features a "Folders" section with a table listing three folders: "Project 1", "Project 2", and "Project Files". The table has columns for "Folder", "# of Folders", and "# of Documents". Below the table, it says "Showing 3 results." The "Documents" section below is empty, displaying a message: "There are no documents or media files in this folder."

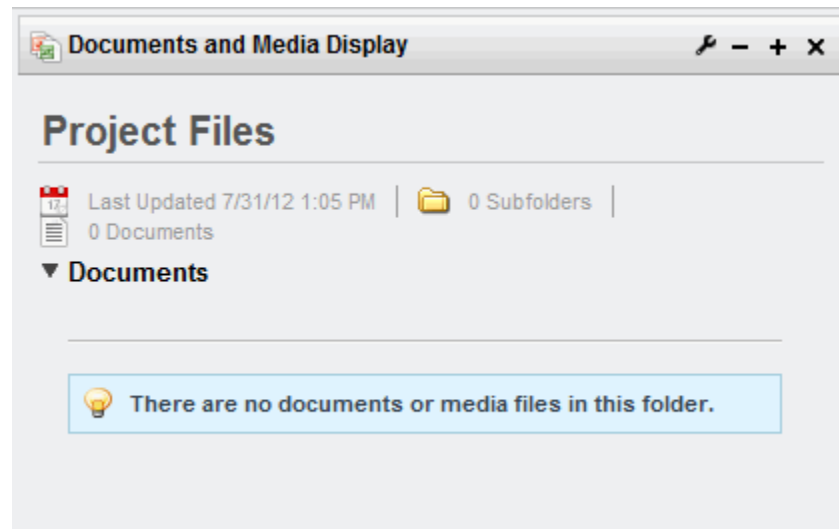
Folder	# of Folders	# of Documents
 Project 1	0	1
 Project 2	0	0
 Project Files	0	0

Showing 3 results.

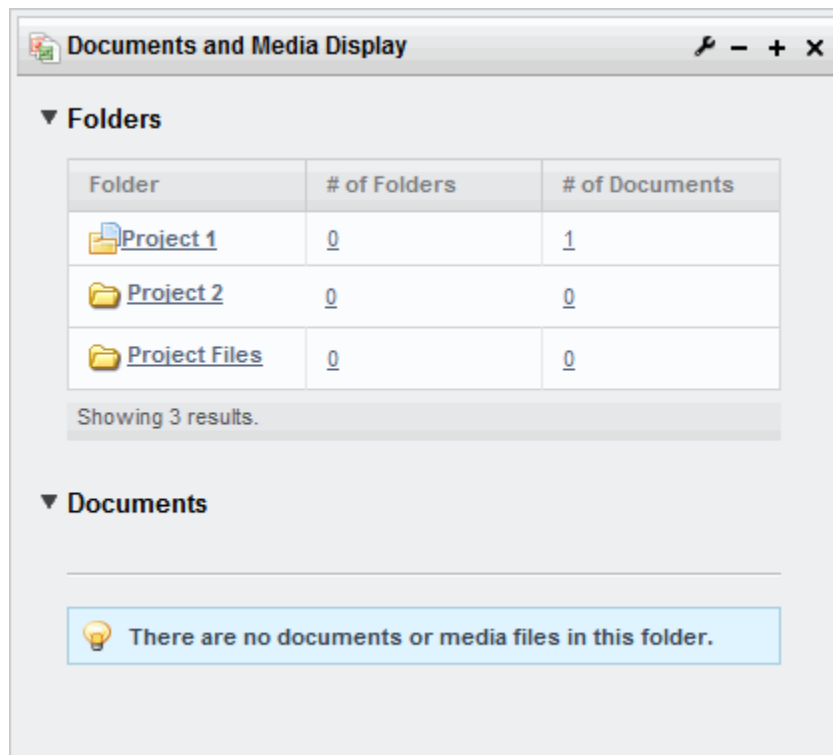
Documents

 There are no documents or media files in this folder.


RESULT:



1. Navigate to the Documents and Media Display Portlet for which you wish to modify the folders on display.



2. Click the **Configuration** icon in the upper right corner of the portlet. The Setup Screen is displayed. (If you do not see edit controls in the portlet, you must enable Toggle Edit Controls).


Documents and Media Display - Configuration

Setup

Permissions

Communication

Sharing

Scope

Display Settings

☐ Show Actions
 ☐ Show Folder Menu
 ☐ Show Navigation Links
 ☐ Show Search

Folders Listing

Root Folder

Select

Remove

☒ Show Subfolders


Folders per Page

20

- In the Folder Listing section, click **Select** to modify the location in the folder structure you wish to show on your portal.

Home

Choose This Folder

Folder	# of Folders	# of Documents	
 Project 1	0	1	<div>Choose</div>
 Project 2	0	0	<div>Choose</div>
 Project Files	0	0	<div>Choose</div>

Showing 3 results.

- Navigate the folder structure until you reach the level of folders you wish to display, then click **Choose**. The screen refreshes and the new folder is selected. In this example, click **Choose** in the Project Files row. Only the selected folder, and subfolders below it will display in the Documents and Media Display Portlet. In this example, only the Project Files folder (and it's subfolders) will display in the portlet.
- Scroll to the bottom of the screen and click **Save**.
- Optionally, modify permissions on this portlet by clicking **Permissions**. (Refer to steps 3 - 9 of Modifying Permissions for further details. [Learn more...](#))

7. When finished configuring the portlet, click **Close dialog** (in the upper right corner of portlet).

RESULTS

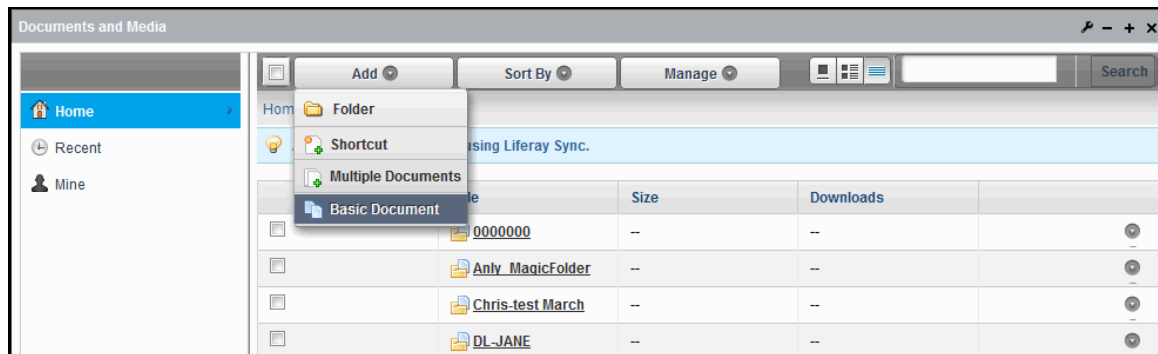
You have successfully modified which folders are displayed in a document library portlet.

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.

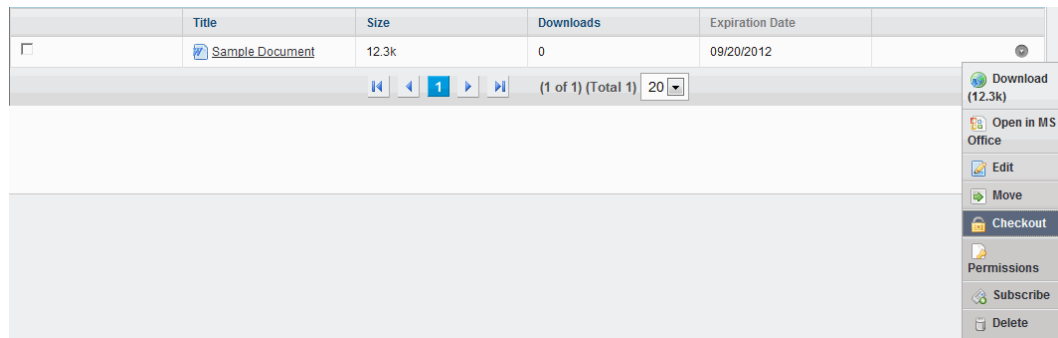
Editing a Document



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.



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.

The screenshot shows the 'Documents and Media' interface. On the left is a sidebar with a navigation tree containing 'Up', 'OpenSocial Gadgets', 'Project 1' (selected), 'Project 2', 'Project Files', and 'testing'. The main area shows a breadcrumb 'Home > Project 1' and a table of documents. The table has columns: Title, Size, Downloads, Expiration Date, and an action column. One document is listed: 'testresults.txt' with size '0.0k' and '0' downloads. The action column for this document contains a circular menu icon. A context menu is open over this icon, listing actions: Download (0.0k), Edit, Move, Checkout, Permissions, Subscribe, and Delete. The 'Delete' option is highlighted at the bottom of the menu.

Title	Size	Downloads	Expiration Date
testresults.txt	0.0k	0	--


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.









Checking Out a Document

Checking out a document informs other users that the document is currently in use. Once checked out, no other user may make edits to the document. The edits being made will not be reflected until the document is checked in. Once the document is checked in, other users see the changes and may check out the document if they need to make additional changes.

1. Navigate to the file you wish to check out.
2. Click .
3. Click **Check out**. The screen refreshes and the file is checked out.

	Title	Size	Downloads	Expiration Date	
<input type="checkbox"/>	 Sample Document	12.3k	0	09/20/2012	

     (1 of 1) (Total 1) 20 

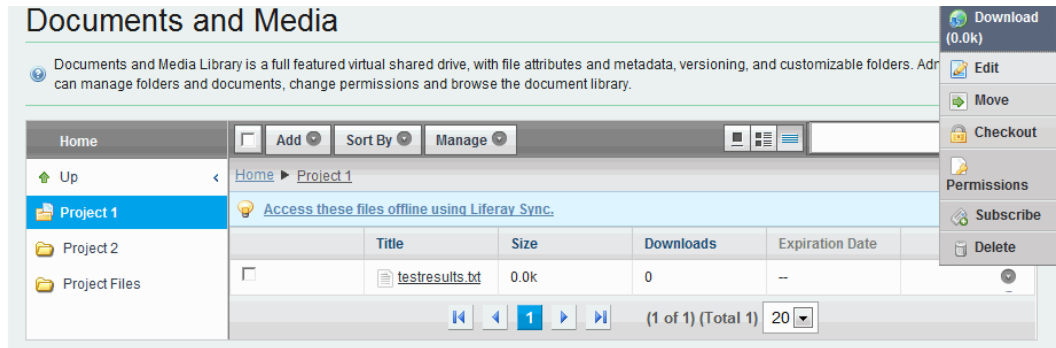
RESULTS


You have successfully checked out a document.

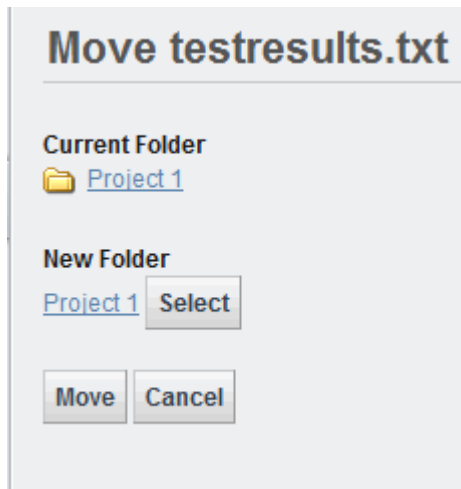
Moving a File to a New Folder

Your role must have permission to move a file to perform the following steps.

1. Navigate to the file you wish to move in the Documents and Media Library. This example moves the file "testresults.txt" out of the folder called "Project 1" and into the "Project 2" folder.



2. Click  for the document you wish to move.
3. Click **Move**. The Move screen for the file is displayed.






4. Click **Select**.
5. Use the navigation path to move up or down in the folder structure to locate the new target folder.

Home

Add Folder

Choose This Folder

Folder	# of Folders	# of Documents	
 Project 1	0	1	<div>Choose</div>
 Project 2	0	0	<div>Choose</div>
 Project Files	0	0	<div>Choose</div>

Showing 3 results.

- Click **Choose** in the row of the folder you wish to select as the new target folder (Project 2, in this example).
- Click **Move**. The screen refreshes, and the file is moved to the new folder location.

RESULTS

You have successfully moved a file to a new folder.

Granting / Modifying Permissions on a Document

1. Access the Documents and Media Library.
2. Navigate to the document for which you wish to modify permissions.

Documents and Media

Documents and Media Library is a full featured virtual shared drive, with file attributes and metadata, versioning, and customizable folders. Administrators can manage folders and documents, change permissions and browse the document library.

Home Add Sort By Manage

Up < Home > Project 1

Project 1

Project 2

Project Files

Access these files offline using Liferay Sync.

	Title	Size	Downloads	Expiration Date
<input type="checkbox"/>	testresults.txt	0.0k	0	--

1 (1 of 1) (Total 1) 20

Download (0.0k)

Edit


Move

Checkout

Permissions

Subscribe

Delete

3. Click .
4. Click Permissions.

testresults.txt « Back

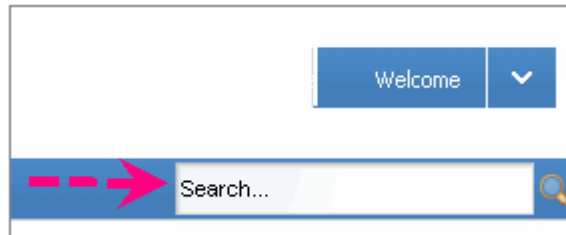
Permissions « Back

Role	Add Discussion	Delete	Delete Discussion	Permissions	Update	Update Discussion	View	Subscribe
Guest	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Portal Content Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Enable the permissions for each role as desired by checking the appropriate boxes.



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 may 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
-

6. Turn off permissions per role as necessary by removing the checkboxes as appropriate.
7. Click **This file only**.

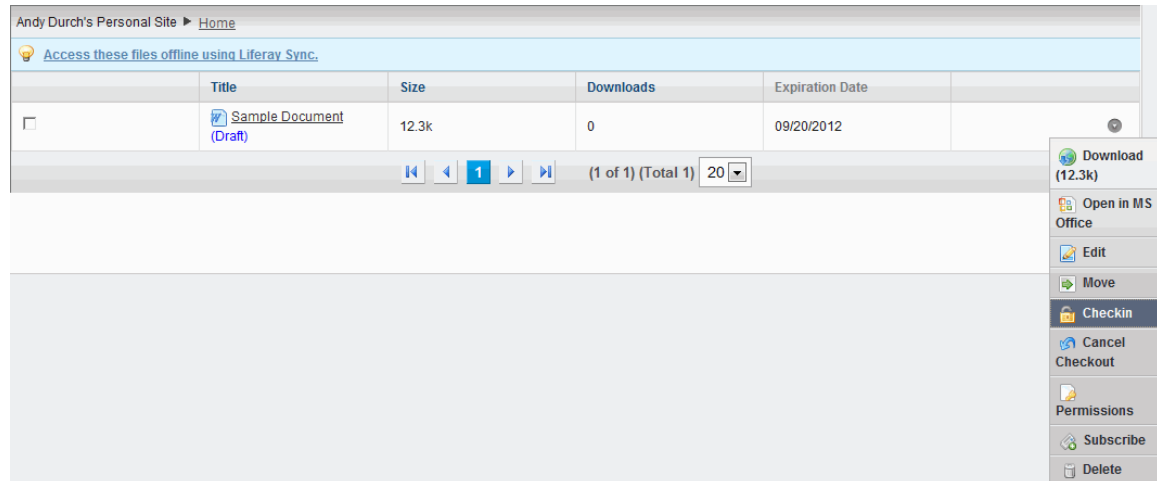
RESULTS

You have successfully modified permissions of a document. If you added documents in bulk, you must still modify permissions on each document.

Checking In a Document

Allow others to edit a document by checking it in.

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




Andy Durch's Personal Site ► Home

💡 Access these files offline using Liferay Sync.

	Title	Size	Downloads	Expiration Date	
<input type="checkbox"/>	Sample Document (Draft)	12.3k	0	09/20/2012	⌵

(1 of 1) (Total 1) 20

- Download (12.3k)
- Open in MS Office
- Edit
- Move
- Checkin**
- Cancel Checkout
- Permissions
- Subscribe
- Delete

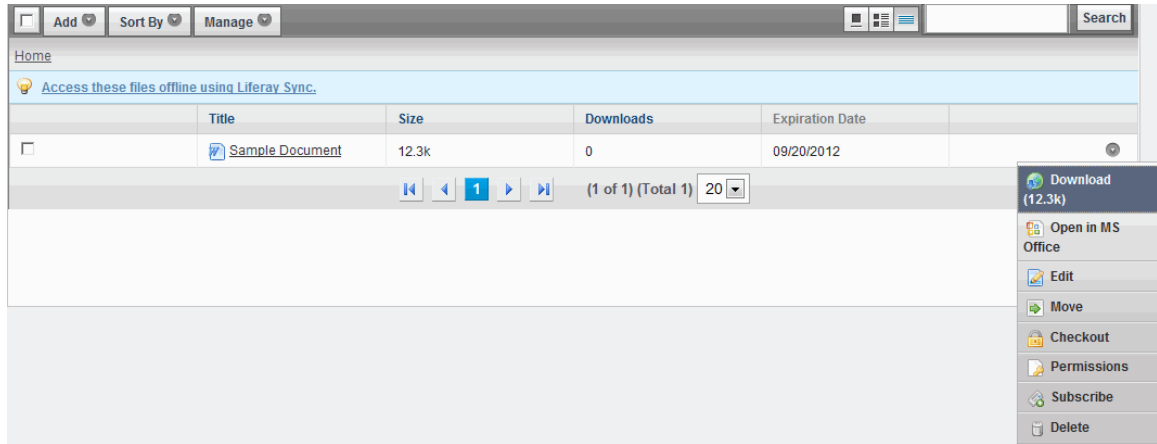
3. Click .
4. Click **Checkin**. The screen refreshes and the document is checked in.


RESULTS

You have successfully checked in a document.

Uploading a New Version of a Document

1. Access the Documents and Media library.
2. Navigate to the document you wish to upload a new version.



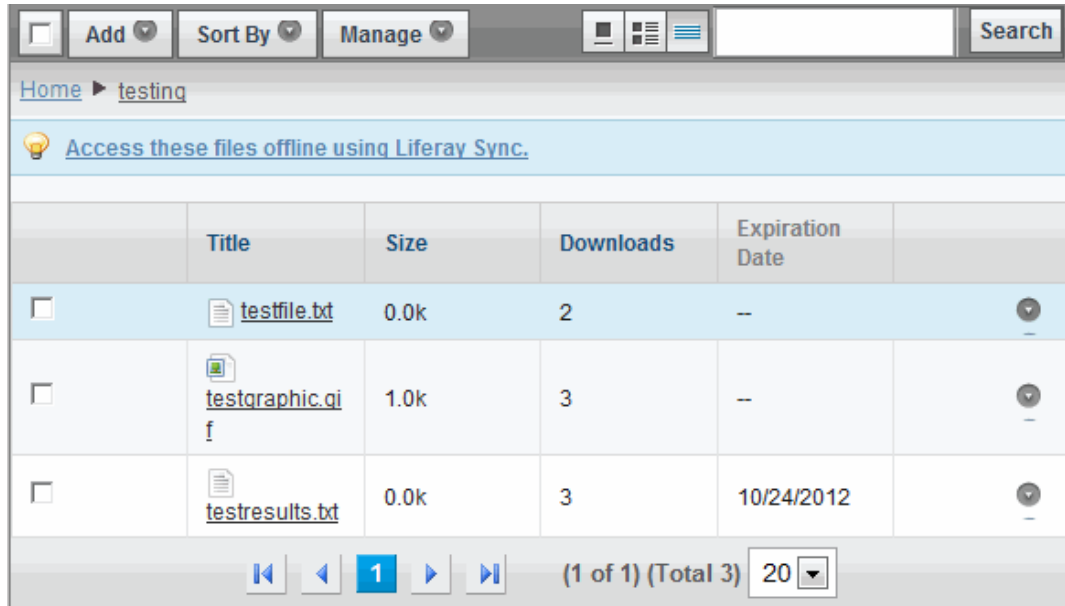
3. Click .
4. Click **Edit**.
5. Click **Browse**, and select the edited file you wish to upload to the portal. The file name will remain the same as the original file stored in Document Library, and an incremental version number will be added.
6. Scroll to the bottom of the screen and click **Save**. The screen refreshes and the edited file is uploaded. Permissions from the previous version are applied to this new version.

RESULTS

You have successfully uploaded a new version of a document and an incremental version number has been added. If necessary, view previous versions.

Viewing Previous Versions of a Document

1. Access the Documents and Media Library.
2. Navigate to the document you wish to view previous versions in the Document Library.




The screenshot shows the Liferay Documents and Media Library interface. At the top, there are buttons for 'Add', 'Sort By', and 'Manage', along with a search bar. Below the navigation bar, there is a breadcrumb trail 'Home > testing'. A blue banner with a lightbulb icon says 'Access these files offline using Liferay Sync.' Below this is a table with columns: 'Title', 'Size', 'Downloads', 'Expiration Date', and a dropdown arrow. The table contains three rows of documents:


	Title	Size	Downloads	Expiration Date	
	testfile.txt	0.0k	2	--	
	testgraphic.gif	1.0k	3	--	
	testresults.txt	0.0k	3	10/24/2012	


At the bottom of the table, there are navigation controls: '1' (selected), '(1 of 1) (Total 3)', and a dropdown menu set to '20'.


3. Click the document name.
4. View previous versions listed under **Version History**.

Version 1.1

 Last Updated by Andy Durch

 8/20/12 11:15 AM

 Status: **Approved**

 [Download \(0.0k\)](#) Get [URL](#) or [WebDAV URL](#).



▼ Automatically Extracted Metadata

Content Encoding
ISO-8859-1

Content Type
text/plain

▼ Version History

[Compare Versions](#)

	Version	Date	Size	Status	
<input type="checkbox"/>	1.1	8/20/12 11:15 AM	0.0k	Approved	
<input type="checkbox"/>	1.0	8/8/12 10:34 AM	0.0k	Approved	

6. Click the version number you wish to view.

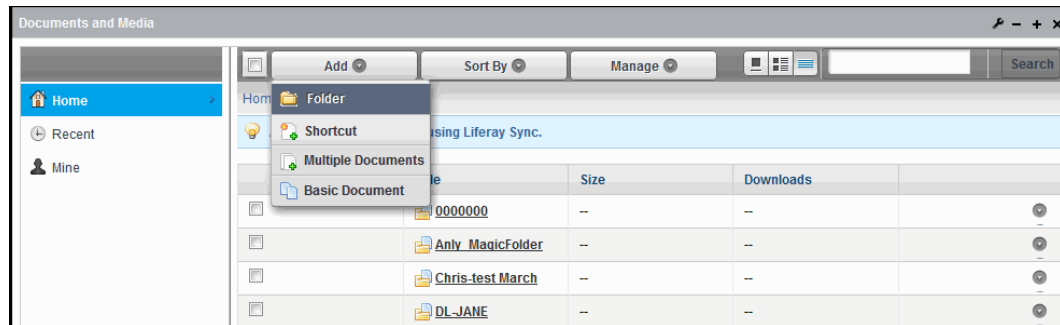
RESULTS

You have successfully viewed previous versions of a document. If necessary, reinstate a previous version.

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.

New Folder

Name (Required)

Description

Permissions

Viewable by Anyone (Guest Role) [More Options](#)

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.

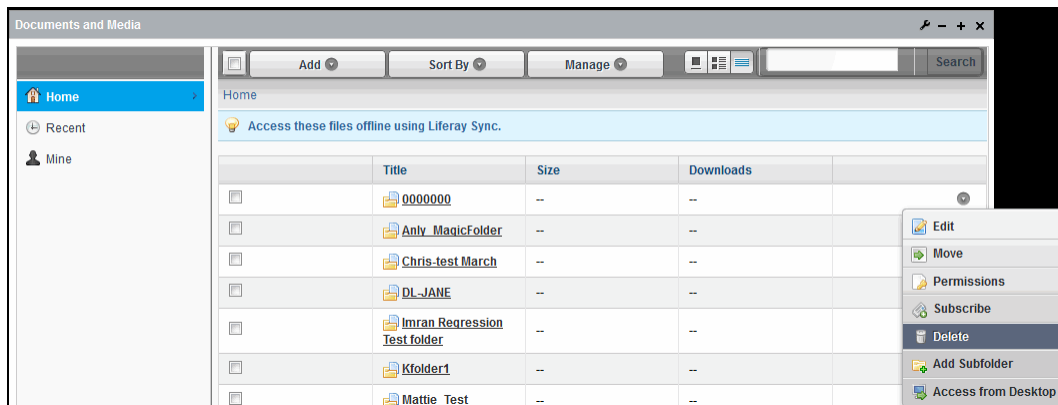
Deleting a Folder

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.



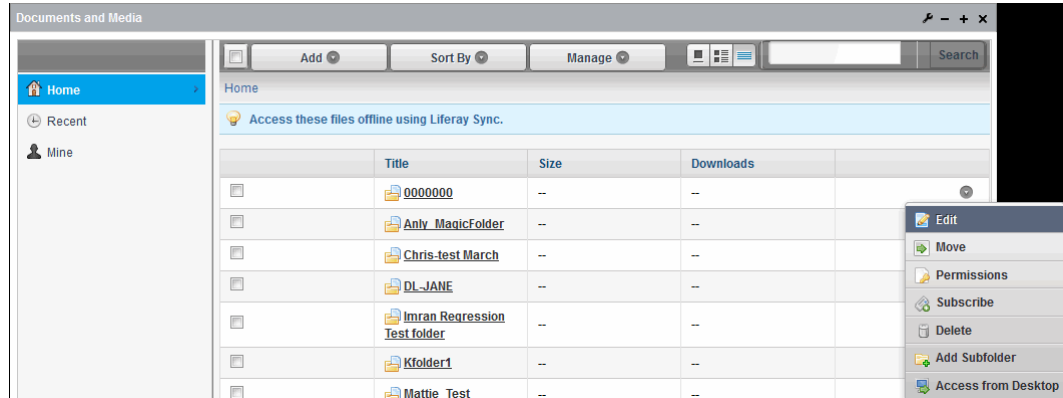
3. Click .
4. Click **Delete**.
5. Click **OK** to confirm deletion. The folder, and all contents within the folder, are deleted from the system. (Remember, if web content on your portal contains a link pointing to this item, edit the web content article to either remove the link/item, or redirect it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

RESULTS

You have successfully deleted a folder.

Editing Folder Properties

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



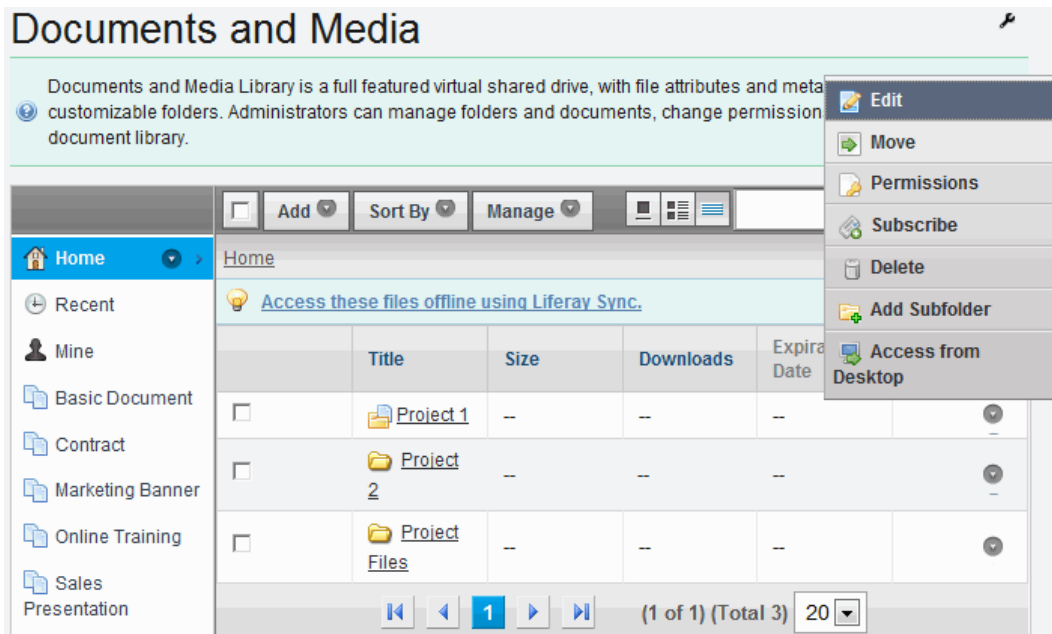
2. Click .
3. Click **Edit**.
4. Modify the folder name / description as desired.
5. Click **Save**.


RESULTS

You have successfully edited folder properties.

Modifying Permissions on a Folder

1. Navigate to the folder for which you wish to modify permissions in the Documents and Media Library.



2. Click .
3. Click **Permissions**.
4. Grant / Modify permissions for each role as desired by checking the appropriate boxes.
5. Click **Save**.



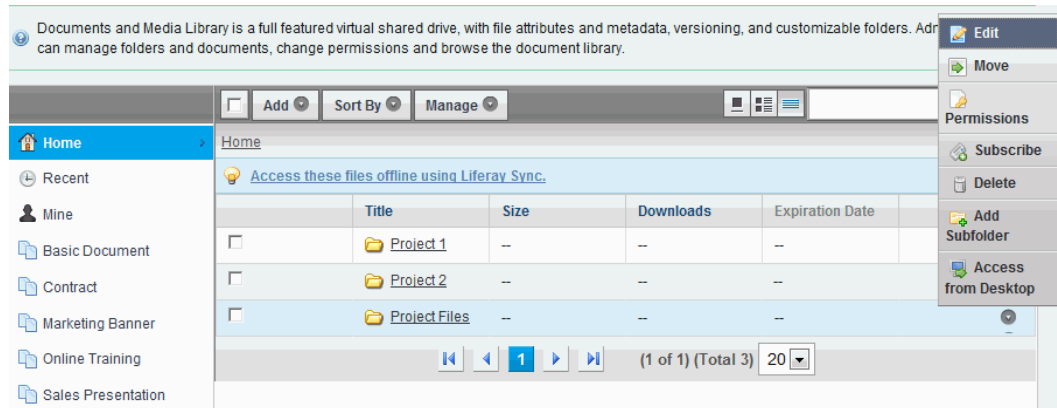
Folder permissions have no impact on the permissions of the documents uploaded to the folder. If you wish to apply the permissions of the folder to the document, you must modify document permissions.


RESULTS

You have successfully modified folder permissions.

Moving a Folder

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



2. Click .
3. Click **Move**.
4. Perform one or more of the following:

If you wish to...	Then...
move a folder to a new parent folder	<ol style="list-style-type: none"> a. Click Select.
move the folder to the root level	<ol style="list-style-type: none"> a. Click Choose in the row of the folder you wish to select as the new parent folder. c. Click Move.
add a new folder	<ol style="list-style-type: none"> a. Click Select. b. Click Add Folder. c. Name the folder. d. Optional: Provide a description and custom permissions. e. Click Save.

RESULTS

You have successfully moved a folder.

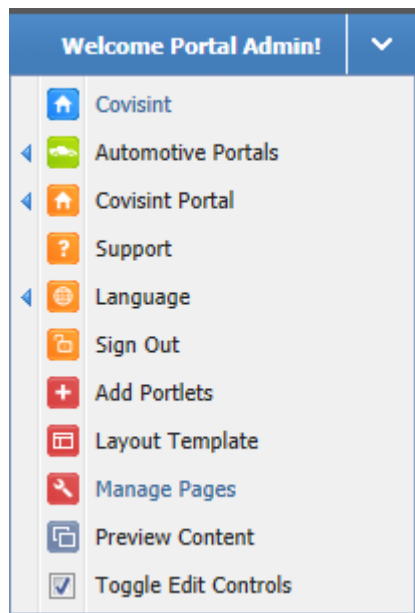
MULTI-LINGUAL PORTALS

Adding a Page in Multiple Languages

Complete the following steps to add language options to portal pages after the page has been created in the default language.

Users' language preferences are determined from their browser settings for users that are not logged in to the portal. Logged in users' language preferences are determined from their account profiles within the Covisint Administration tool. If a user's preferred language type is not available, portal content will display in the default language (English in this example).

1. From the Welcome menu, click **Manage Pages**.



2. Click on the page in the tree structure that you wish to add in multiple languages. (This example uses TestPage).
3. Click **Details** tab.

The screenshot shows the 'Details' form for a page named 'TestPage'. The form includes the following fields and options:

- Name (Required):** TestPage
- HTML Title:** (Empty text field)
- Friendly URL:** https://chrysler.portal.stg.covisint.com/web/portal/testpage
- Hidden:** ☒
- Type:** Portlet

A modal window titled 'Other Languages' is open, showing a dropdown menu with 'French (France)' selected. The modal also includes a 'Save' button and a 'Cancel' button.

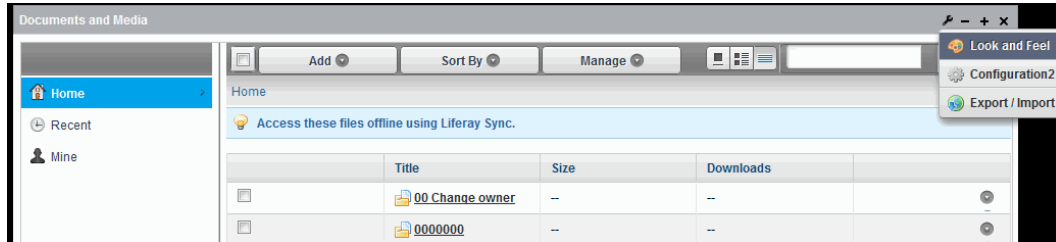
4. From the Other Languages drop down menu, select the target language. (This example uses French).
5. Key in the localized French name of the Page in the open text field. (The menu option will display the name you key into this field).
6. Key in the localized French HTML Title name in the open text field.
7. Click **Save**. The screen refreshes, and the new language is added.
8. Repeat steps 4 - 7 for additional languages as necessary.


RESULTS

You have successfully added a page in multiple languages. You may wish to add multiple languages to the Portlet title, and the article displayed in the portlet.

Renaming a Portlet Title in Multiple Languages

1. Navigate to the existing portlet you wish to rename. (Documents and Media, in this example).



2. Click  (the 'look and feel' icon). The Configuration pop up box is displayed.
3. In the Language drop down menu, select the language in which you wish to enter the title.
4. Key in the portlet title in the appropriate language in the Portlet Title field.
5. Click **Save**.
6. Repeat steps 3 - 5 for each additional language.
7. Close the Look and Feel pop up box.

RESULTS

You have successfully renamed a portlet title in multiple languages.

Adding an Article in Multiple Languages

Complete the following steps to add language options to portal articles after the article has been created in the default language.

Users' language preferences are determined from their browser settings for users that are not logged in to the portal. Logged in users' language preferences are determined from their account profile within the Covisint Administration tool. If a user's preferred language type is not available, portal content will display in the default language (English in this example).

1. Navigate to the Web Content portlet in the Content Management System.
2. Perform a search for the article to which you wish to add languages.
3. From the search results, click **Edit** in the Actions menu of the article. The article is displayed in the editor.

Showing 1 - 20 results of 229 results.

Items per Page 20 results Page 1 of 12 First Previous Next Last

ID	Title	Status	Modified Date	Display Date	Author	
113147	Welcome (Public)	Expired	10/24/12 5:38 AM	10/24/12 5:38 PM		<div> <div>Edit</div> <div>Permissions</div> <div>View (Opens New Window)</div> <div>Copy</div> <div>Delete</div> </div> <div>Actions</div>
113348	Extended Enterprise	Approved	12/10/09 3:35 PM	10/24/12 5:38 PM		<div>Actions</div>
113358	Organization	Approved	12/23/08 7:31 PM	10/24/12 5:38 PM		<div>Actions</div>
			12/18/09 2:45 PM	10/24/12 5:38 PM		

4. In the Add Translation drop down menu, select the target language.

The screenshot shows the 'Web Content' editor for an article titled 'Welcome (Public)'. The article's status is 'Expired'. The 'Default Language' is set to 'English (United States)'. The 'Add Translation' dropdown menu is open, showing a list of languages: French (France), Swedish (Sweden), Korean (South Korea), German (Germany), Spanish (Spain), Portuguese (Brazil), Chinese (China), and Japanese (Japan). The 'Content' sidebar on the right shows a list of content elements: Abstract, Categorization, Schedule, Display Page, Related Assets, and Custom Fields. The 'Save', 'Publish', and 'Cancel' buttons are visible at the bottom of the sidebar.

5. In the Editor, key in the article in the selected language.
6. Click **Save**. The article is saved, but not yet published to the portal.
7. Repeat steps 4 - 6 as necessary to add additional languages to the article.
8. Click **Save**.

RESULTS

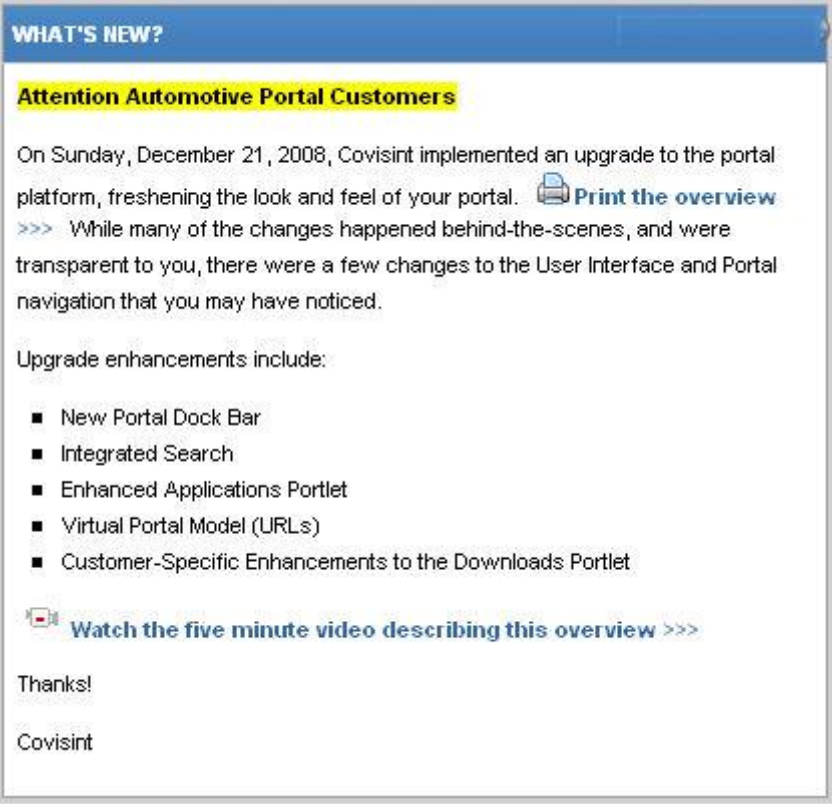
You have successfully added an article in multiple languages. You may wish to add the language to the Page title and/or the portlet title.



MANAGING WEB CONTENT


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.

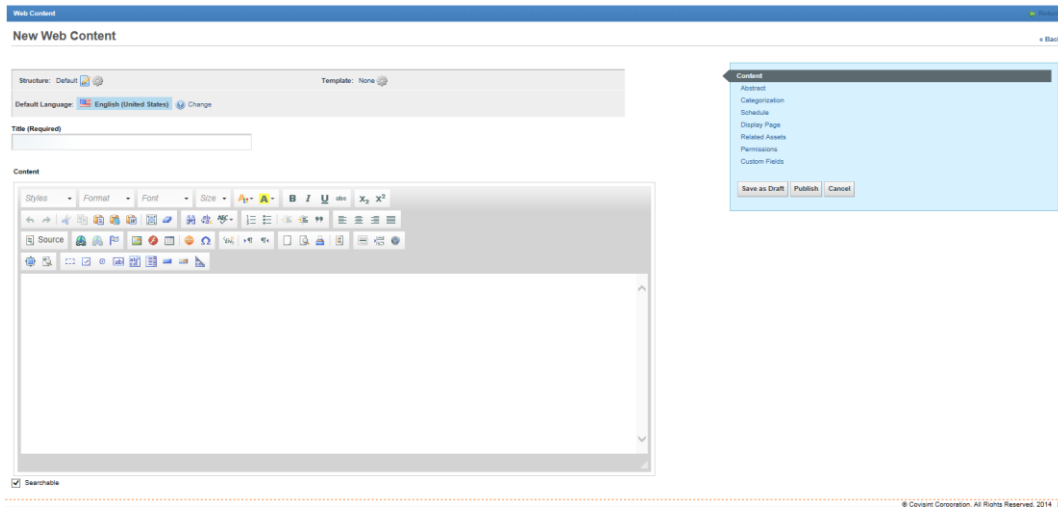
It is imperative that you review the section entitled Permissions Overview before proceeding further.

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

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.

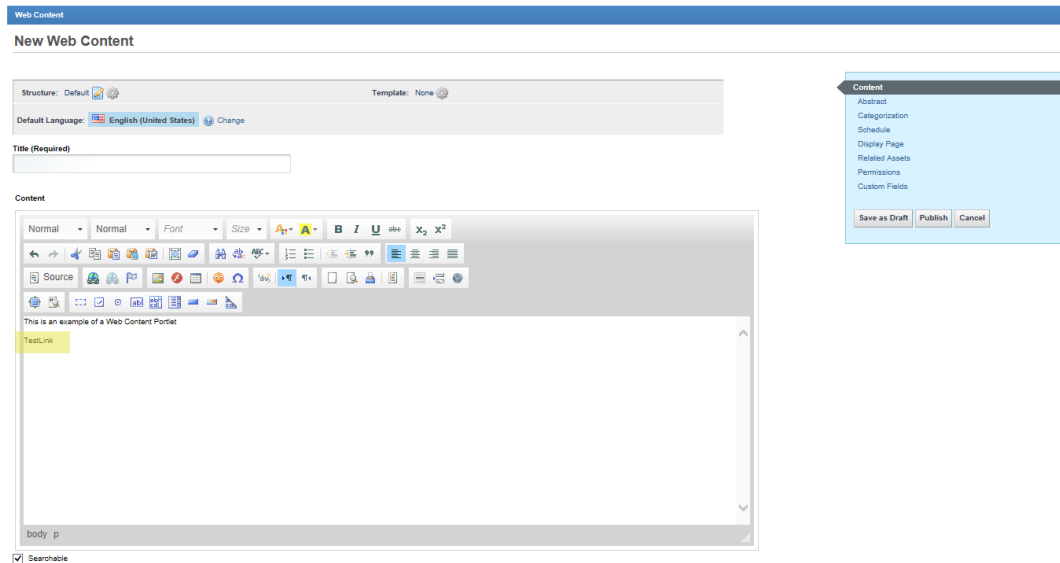
RESULT:

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.

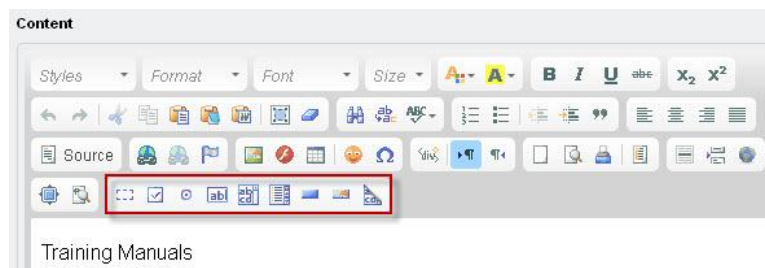
WYSIWYG (Full-Feature) Editor Overview

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.



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.

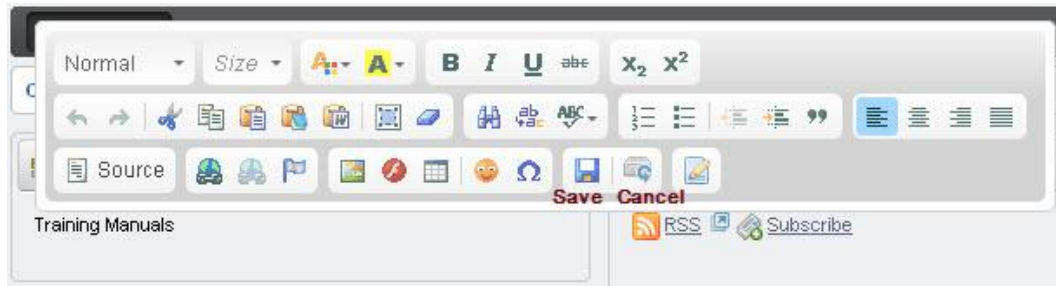
Do not attempt to simultaneously edit multiple web content articles in multiple tabs in your browser.

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

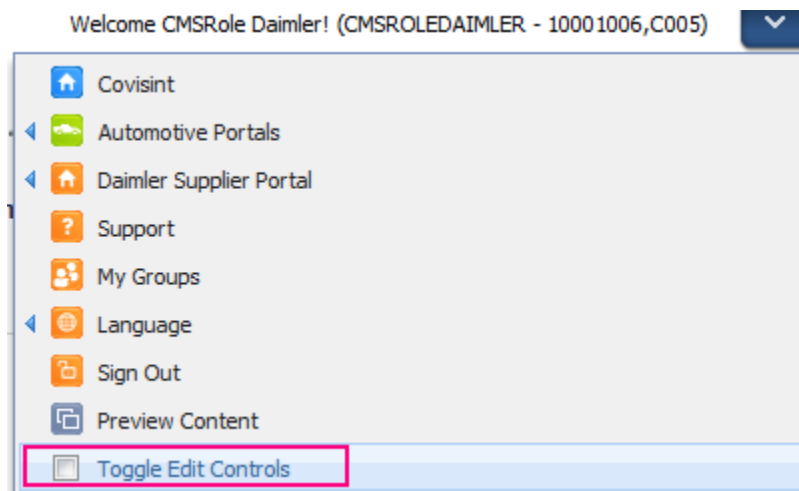
Inline Editor Overview

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.

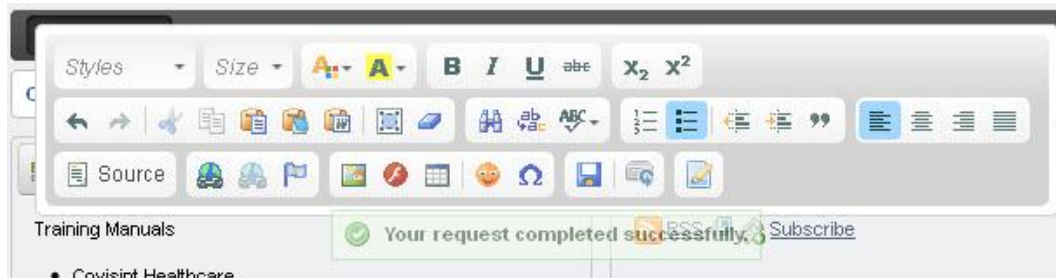
- User can either save the edited version by clicking the **Save** button or remove the edited version by clicking the **Cancel** button.



- Enabling workflow will disable inline editor
- Unchecking the “Edit Controls” will also disable inline editor.

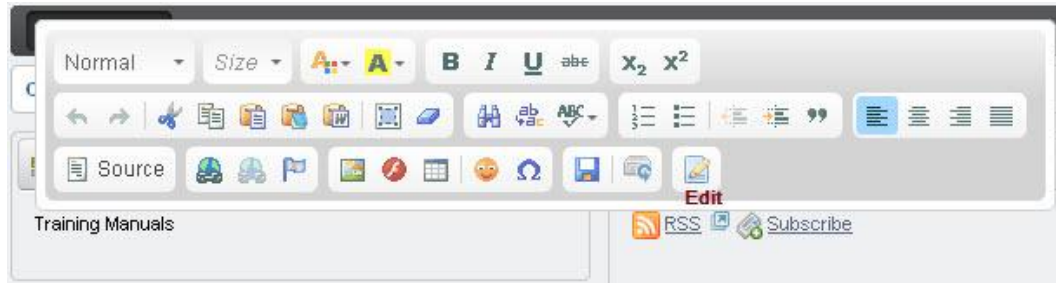


- When saving the edited version in the Inline mode a confirmation message displays.



- 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.

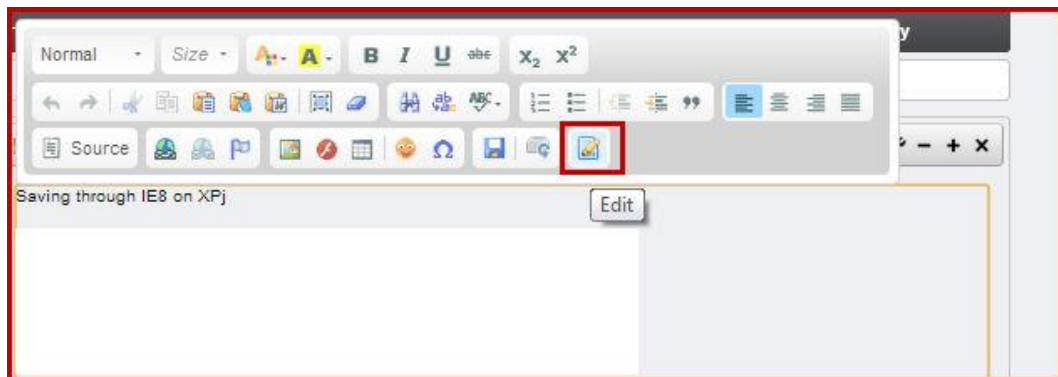


Note: Only edit one article of web content at a time.

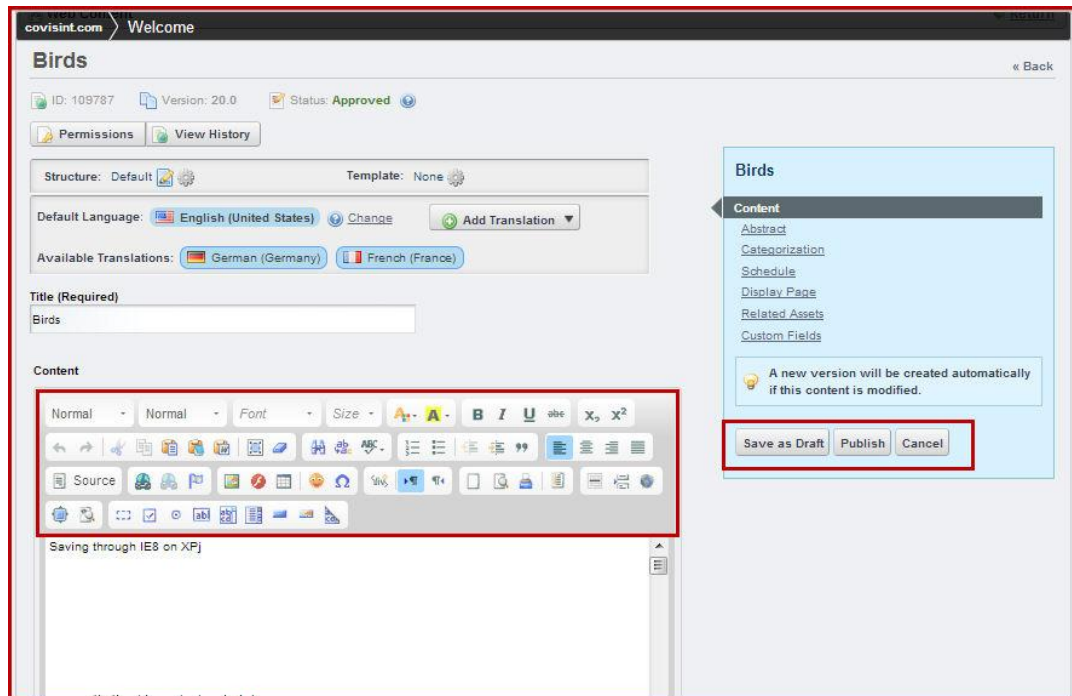
Do not attempt to simultaneously edit multiple web content articles in multiple tabs in your browser.

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). 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



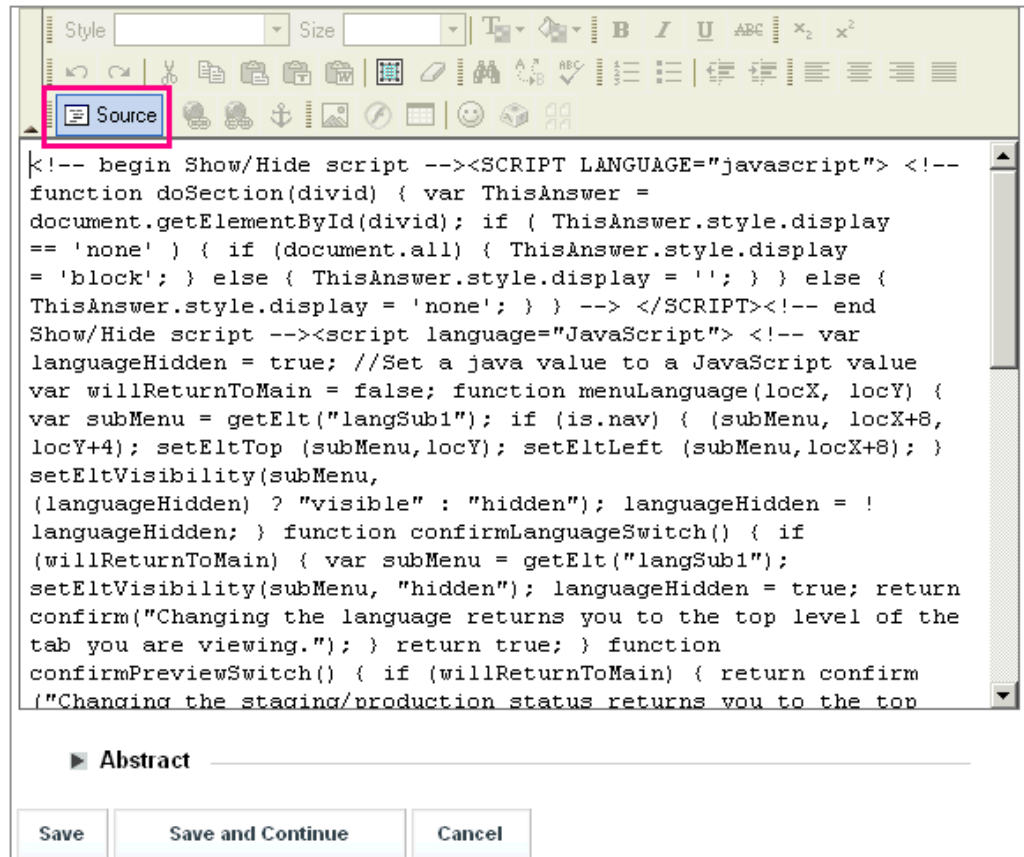
If you added a new document to this web content article and uploaded it to Documents and Media Library, you may need to modify user permissions on the document after saving your changes.

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). <div data-bbox="623 1285 1341 1694" data-label="Form"> <p>Schedule</p> <p>Display Date August 1 2012 10:59 AM</p> <p>Expiration Date August 15 2013 3:11 PM</p> <p><input checked="" type="checkbox"/> Never Auto Expire</p> <p>Review Date May 15 2013 3:11 PM</p> <p><input checked="" type="checkbox"/> Never Review</p> </div> 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?



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.

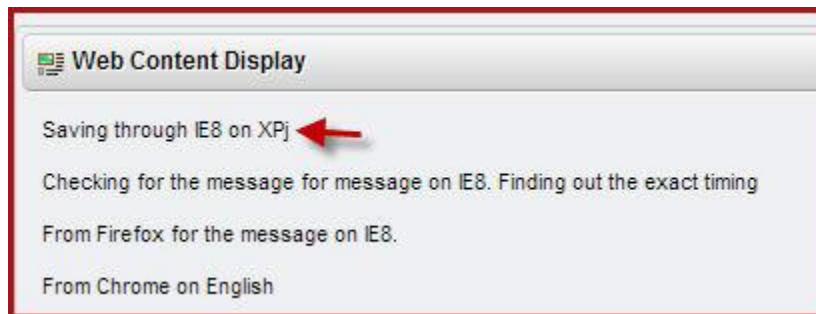
RESULTS

You have successfully edited a web content article.

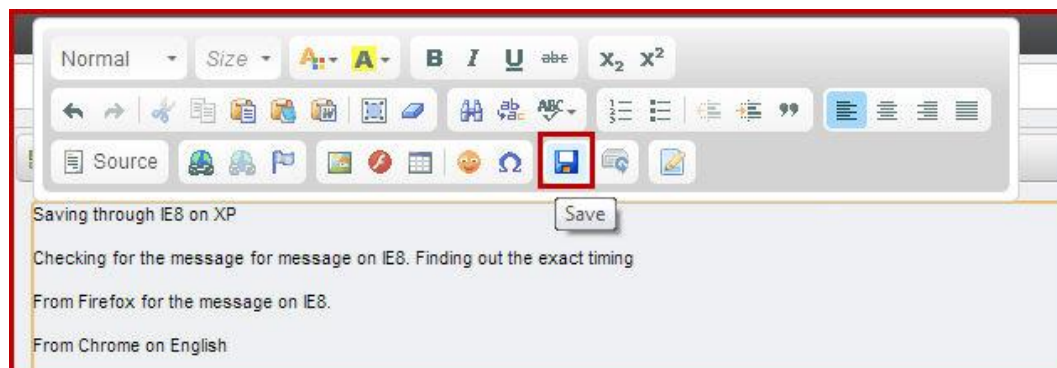
Using Inline Editor

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.

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.



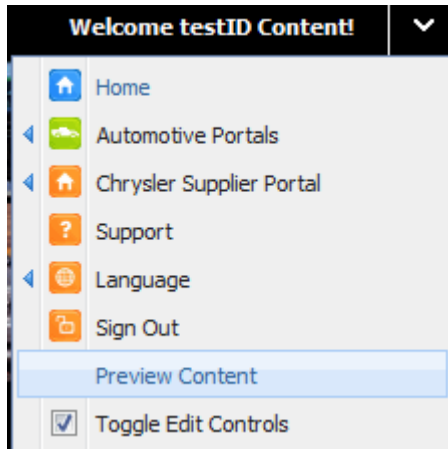
Warning: Only edit one article of web content at a time.


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

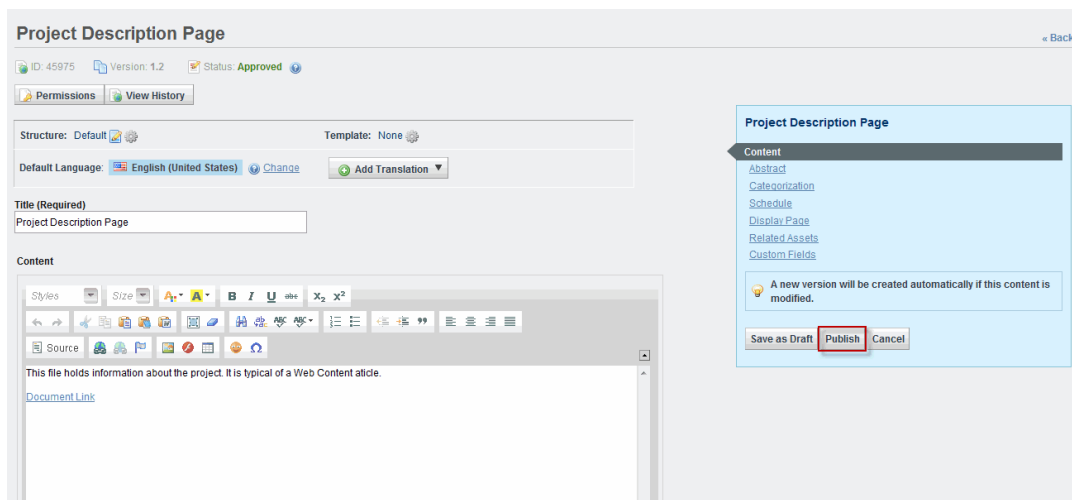
If you edit multiple articles in browser tabs, when you save or approve one of the articles, the action may be applied to all the articles.



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:
 - **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)**
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)

IF
You
Wish
To....

THEN:

▼ **Schedule**

Display Date

May 25 2010 2 :06 PM

Expiration Date

February 14 2013 1 :25 PM

Never Auto Expire ☒

Review Date

November 14 2012 1 :25 PM

Never Review ☒

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.

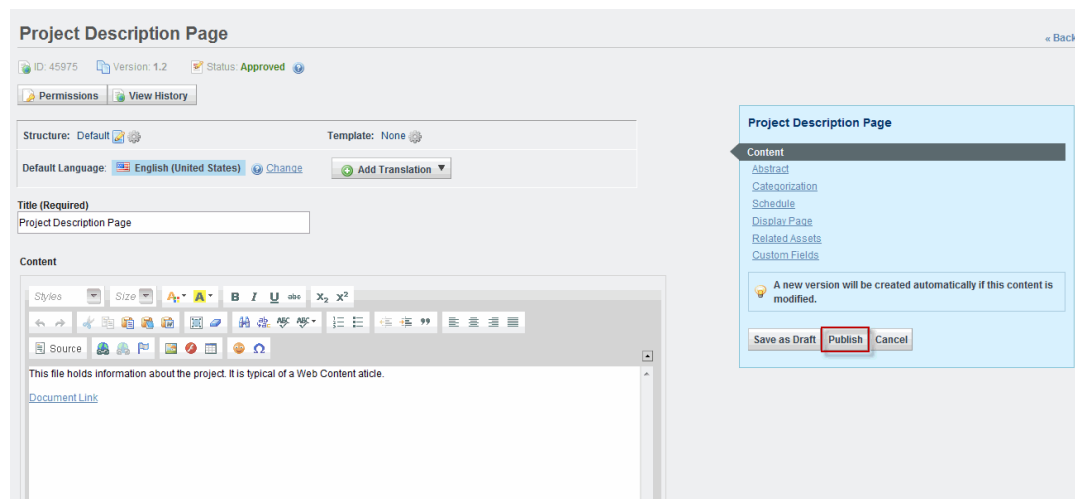
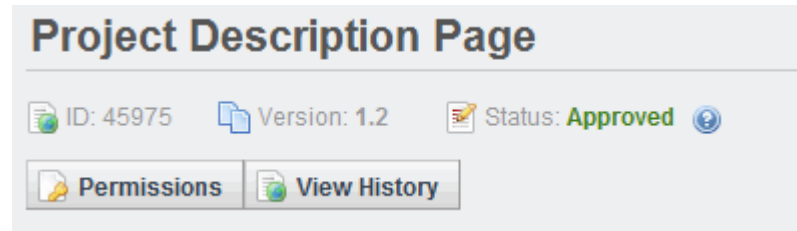
1. Navigate to the portlet in which the content you wish to edit is displayed.



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:

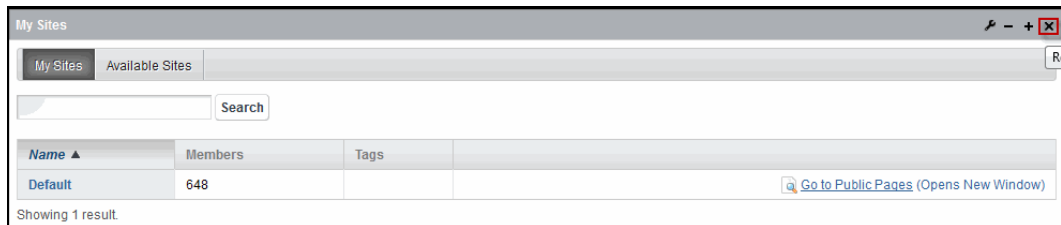
IF YOU WISH To...	THEN:
Approve and publish the content	a. Click Save as Draft. b. Click Publish . The screen refreshes, and a confirmation message is displayed. c. Click Back . The new version of the article is created and displayed on the portal.
Save content as a draft and return without publishing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

RESULTS

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 screenshot shows the 'Project Description Page' interface. Callout 1 points to the 'Title (Required)' field, which contains 'Project Description Page'. Callout 2 points to the 'Permissions' and 'View History' buttons. Callout 3 points to the 'Schedule' link in the 'Content' sidebar. Callout 4 points to the 'Save as Draft', 'Publish', and 'Cancel' buttons at the bottom of the sidebar.

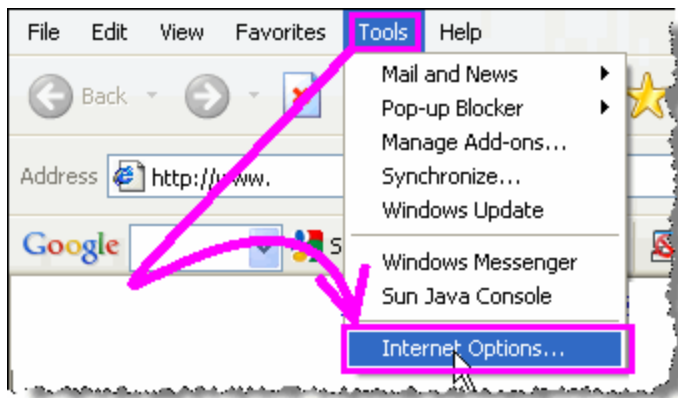
The following is a description of web content article properties most often used in content publishing.

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	<p><i>Save as Draft</i> - Enables user to save changes, and closes the editor.</p> <p><i>Publish</i> - 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.</p> <p><i>Cancel</i> - Cancels all edits that have occurred since the last save, and closes the editor.</p>

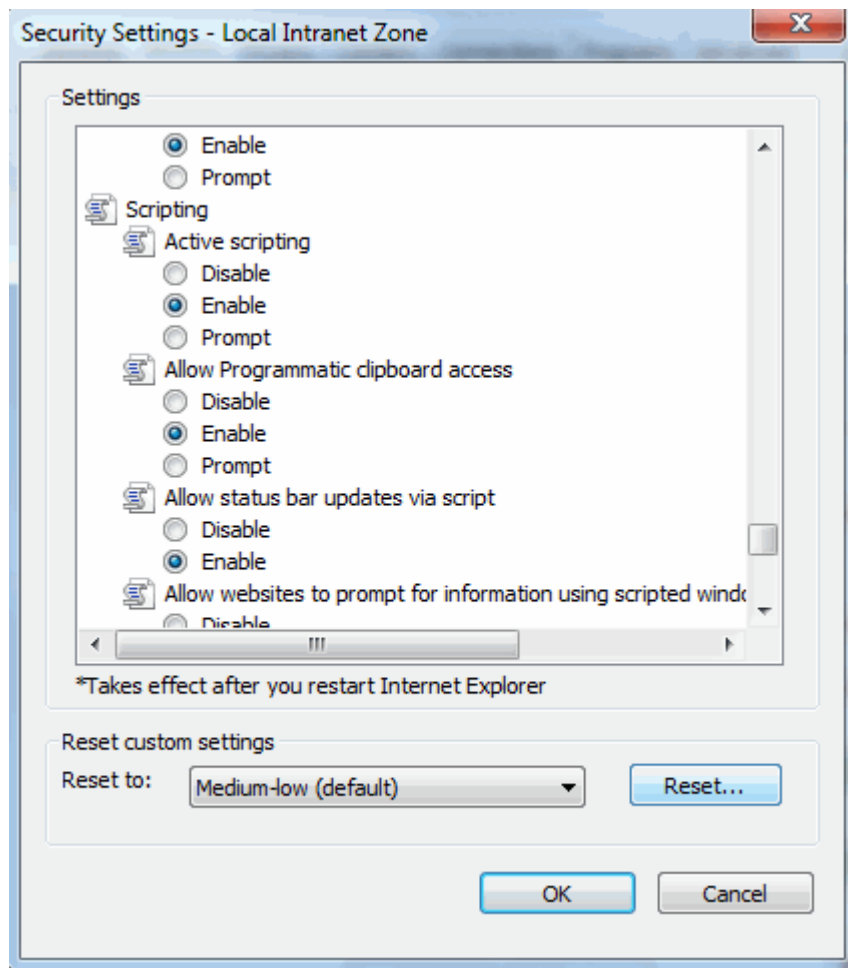
Pasting Content into the Editor

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

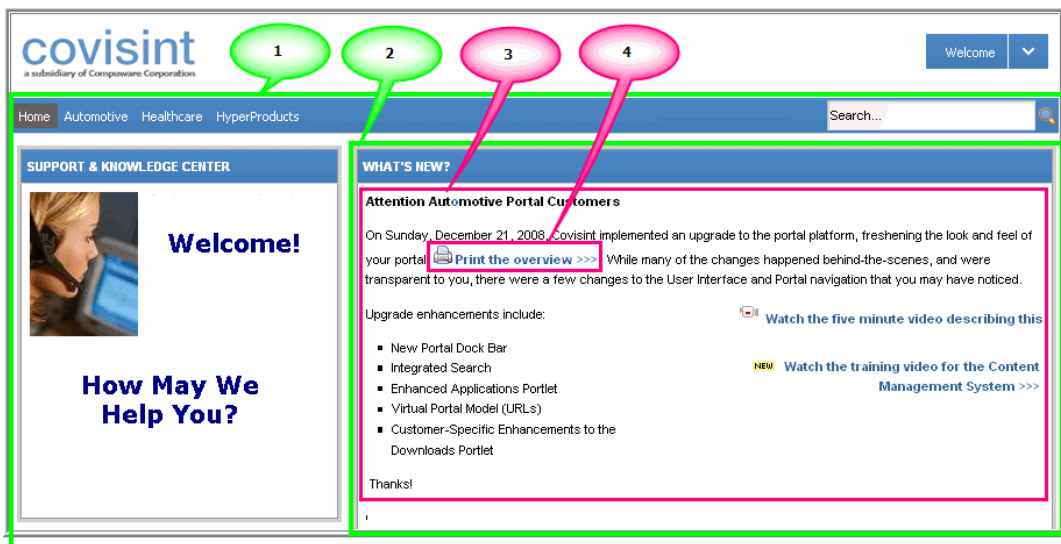
The permission system is a very flexible mechanism used to define the actions a given user can perform within the general context of the portal, or within a given portlet and its data.

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:

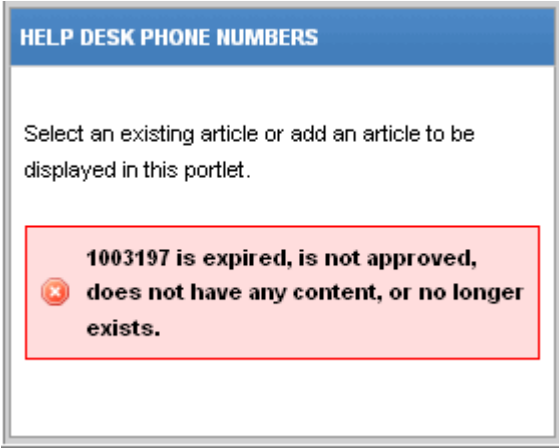
1. **page on portal**
2. **portlet on page**
3. **article in portlet**
4. **document in article**




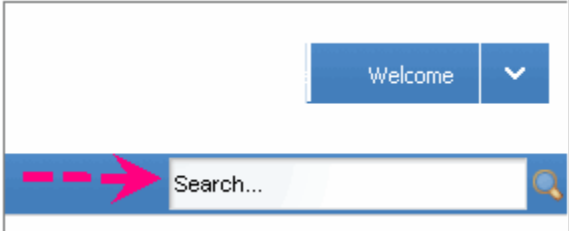
Unless your Administrator has changed the default settings, then:

- 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
	<p>Portlet permissions allow the user to view the portlet.</p> <p>Article permissions do not allow the user to view the article within the portlet.</p>	<p>Apply appropriate permissions for this user type to the article.</p>

ERROR	ISSUE	HOW TO RESOLVE
<p>WHAT'S NEW?</p> <p>Attention Automotive Portal Customers</p> <p>On Sunday, December 21, 2008, Covisint implemented an upgrade to the portal platform, freshening the look and feel of your portal. 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.</p> <p>Upgrade enhancements include:</p> <ul style="list-style-type: none"> ■ New Portal Dock Bar ■ Integrated Search ■ Enhanced Applications Portlet ■ Virtual Portal Model (URLs) ■ Customer-Specific Enhancements to the Downloads Portlet <p>Thanks!</p> <p>Covisint</p>	<p>Portlet permissions allow the user to view the portlet.</p>	<p>Apply appropriate permissions for this user type to the document.</p>
<p>A user cannot see the article or the document because the user cannot see the portlet on the page</p>	<p>Article permissions allow the user to view the article within the portlet.</p>	<p>Document permissions do not allow the user to view the document.</p>
	<p>Portlet permissions do not allow the user to view the portlet.</p>	<p>Contact your Portal Content Administrator to modify portlet permissions if appropriate.</p>

ERROR	ISSUE	HOW TO RESOLVE
<div data-bbox="315 270 383 338"></div> <p data-bbox="315 315 862 495">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.</p> <div data-bbox="318 543 883 772"></div> <ul data-bbox="318 821 699 974" style="list-style-type: none">✓ 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.

Web Content

Web Content can be any content you would like to add to a site, such as articles, a FAQ, or a news item. Administrators can manage content, as well as assign user roles and permissions. Users may add, edit, approve, or view content depending on their role.

Web Content Structures Templates Feeds Recent

Search

[Advanced »](#)

Add Permissions [Subscribe](#)

Expire Delete

<input checked="" type="checkbox"/>	ID ▲	Title	Status	Modified Date	Display Date	Author	
<input checked="" type="checkbox"/>	45975	Project Description Page	Approved	8/1/12 11:00 AM	8/1/12 10:59 AM	Andy Dorch	Actions

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

Web Content

Project Description Page [« Back](#)

Permissions [« Back](#)

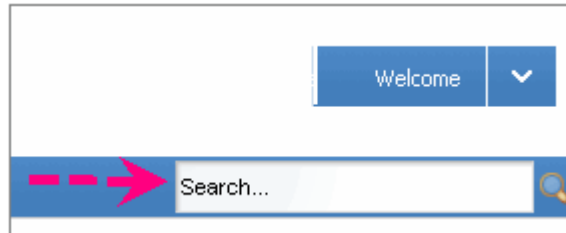
Role	Add Discussion	Delete	Delete Discussion	Expire	Permissions	Update	Update Discussion	View
Guest	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Portal Content Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Power User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Content Reviewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site Member	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

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.

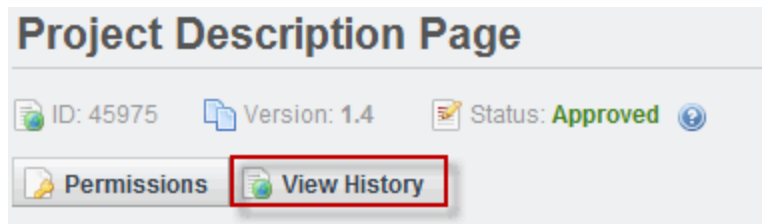
Reinstating a Previous Version of an Article

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.



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

Project Description Page « Back

Expire **Delete**

<input type="checkbox"/>	ID	Title	Version ▲	Status	Modified Date	Display Date	Author	
<input type="checkbox"/>	45975	Project Description Page	1.0	Approved	8/1/12 11:00 AM	8/1/12 10:59 AM	Andy Durch	⏮ Actions
<input type="checkbox"/>	45975	Project Description Page	1.1	Approved	8/3/12 10:30 AM	8/1/12 10:59 AM	Andy Durch	⏮ Actions
<input type="checkbox"/>	45975	Project Description Page	1.2	Approved	8/8/12 3:41 PM	8/1/12 10:59 AM	Andy Durch	⏮ Actions
<input checked="" type="checkbox"/>	45975	Project Description Page	1.3	Approved	9/7/12 3:23 PM	8/1/12 10:59 AM	Andy Durch	⏮ Actions
<input checked="" type="checkbox"/>	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.

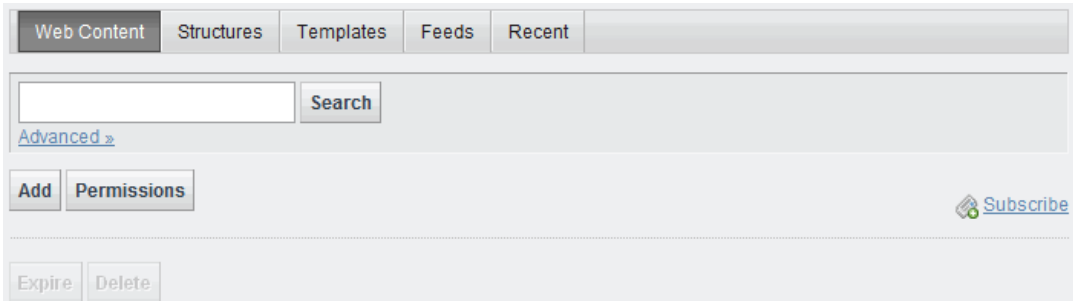
5. Click **Back**. The previous version is now active.

RESULTS

You have successfully restored a previous version of web content.

Searching / Viewing a Web Content Article

1. Access the Web Content Administration Portlet.



The screenshot shows the top navigation bar of the Web Content Administration Portlet with tabs for 'Web Content', 'Structures', 'Templates', 'Feeds', and 'Recent'. Below the tabs is a search bar with a 'Search' button and a link to 'Advanced »'. There are also buttons for 'Add' and 'Permissions', and a 'Subscribe' link with a RSS icon. At the bottom of the portlet are 'Expire' and 'Delete' buttons.

2. Key in the web content ID number in the open text field.

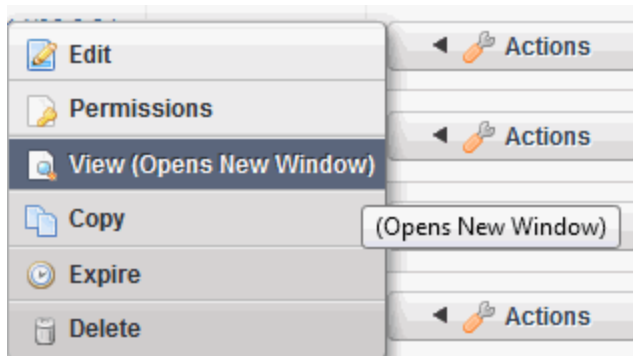


If you do not know the ID number, search by article name, by **clicking Advanced >>**



The screenshot shows the 'Advanced' search interface. It features a 'Match' dropdown set to 'All' and a label 'of the following fields:'. Below this are two rows of search fields: the first row has 'ID', 'Title', and 'Description'; the second row has 'Content', 'Type' (a dropdown), and 'Status' (a dropdown). A 'Search' button is at the bottom left, and a link to '< Basic' is at the bottom left.

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



The screenshot shows a context menu for search results. The menu items are 'Edit', 'Permissions', 'View (Opens New Window)', 'Copy', 'Expire', and 'Delete'. To the right of these items are 'Actions' buttons, some with a left arrow icon. A tooltip '(Opens New Window)' is visible over the 'View' button.

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



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

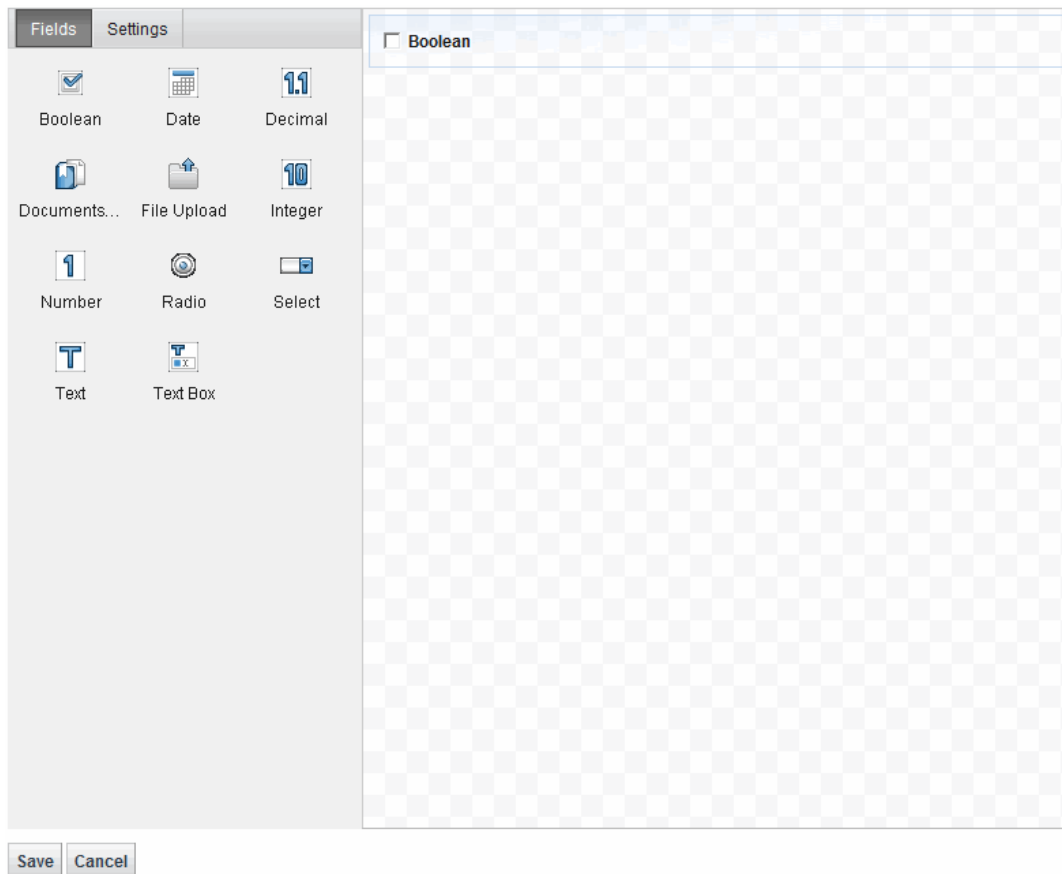
4. Click **Publish**.

RESULTS

You have successfully set an expiration date for Portal content.

Adding Metadata Sets

1. Navigate to the Control Panel.
2. Click **Documents and Media**.
3. Click **Manage**.
4. Click Metadata Sets.
5. Click **Add**.
6. Enter a name.
7. Optional: Enter a description.
8. Click any of the Field types and drag them into the right pane.



Field types are as follows:

- **Boolean:** is a checkbox.
- **Date:** lets you enter a date. A valid date format is required for the date field, but you don't have to enter a date manually. When you select the date field a mini-calendar pops up which you can use to select a date.
- **Decimal:** lets you enter a decimal number. The value will be persisted as a double.
- **Documents and Media:** lets you select a file from one of the portal's Documents and Media libraries.
- **File Upload:** lets you select file to upload from your local system.
- **Integer:** lets you enter an integer. The value will be persisted as an int.

- **Number:** lets you enter a decimal number or an integer. The value will be persisted either as a double or an int, depending on the type of input.
- **Radio:** displays several clickable options. The default number is three but this is customizable. Only one option can be selected at a time.
- **Select:** is just like the radio field except that the options are hidden and have to be accessed from a drop-down menu.
- **Text:** lets you enter a single line of text.
- **Text Box:** is just like the text field except you can enter multiple lines of text or separate paragraphs.

9. Define the selected fields.

10. Click **Save**.

RESULTS

You have successfully added a Metadata set.

Categories

Categories are similar in concept to tags, but are designed for use by administrators. Hierarchies of categories can be created, and categories can be grouped together in vocabularies. Categories exist to allow administrators to organize content in a more official, hierarchical structure.

1. Add the Categories portlet to a page (or go to the CMS page where this portlet has been added for your portal).
2. Click **Add Category**.

Add Category [Close]

Name
 Other Languages (0) ▼

Description

 Other Languages (0) ▼

To Vocabulary
 ▼

▼ **Permissions**

Viewable by ▼
[More Options »](#)

► **Properties**

3. Enter a name for the Category.
4. Optional: Enter a description for the Category.
5. Optional: Select a Vocabulary to link the Category.
6. Optional: Set permissions to view or modify the Category.
7. Click **Save**.

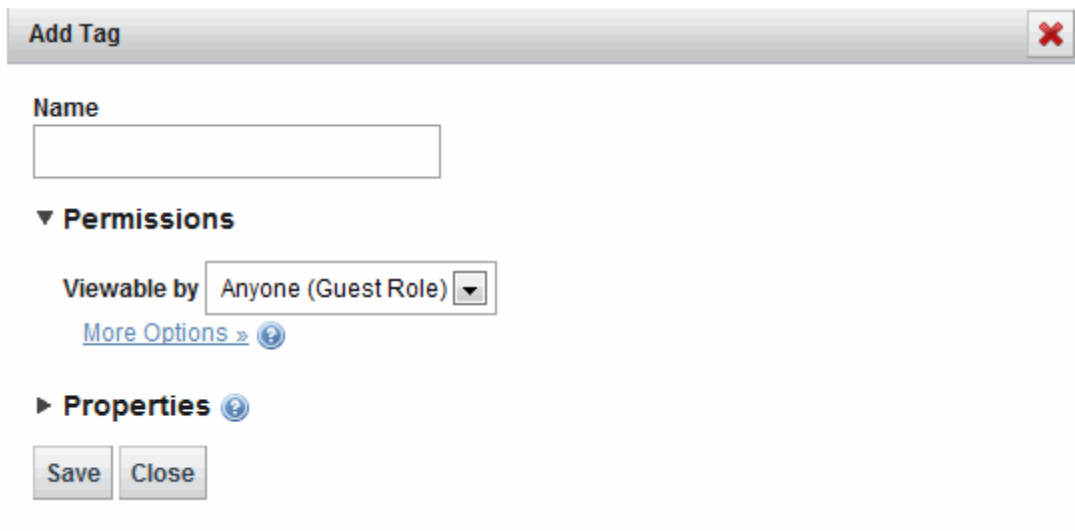
RESULTS


You have successfully created a Category.

Tags

Tags are words or phrases that you can attach to any content on the system. Tagging content will make your search results more accurate, and enable you to use tools like the Asset Publisher to display content in an organized fashion on a Portlet page.

1. Add the Tags portlet to a page (or go to the CMS page where it has been added for your portal).
2. Click **Add Tag**.





Add Tag 

Name

▼ Permissions

Viewable by Anyone (Guest Role) ▼

[More Options >](#) 

► Properties 

Save **Close**

3. Enter a name for the Tag.
4. Optional: set permissions to view or modify the tag.
5. Click **Save**.

RESULTS

You have successfully created a Tag.
