Content Publisher Role

Table of Contents

OVERVIEW OF THE CONTENT MANAGEMENT SYSTEM

Covisint's Portal provides Content Management System functionality in two major areas: **document management** (repositories for documents and images) and **publishing**. Document management is provided through Covisint's *Document Library* and *Image Gallery* portlets. These portlets provide intuitive management of your organization's files and images.

Content that is stored in the *document library* and *image gallery* 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 stored in the document library. Images that are stored in the image gallery could be displayed in an article.

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.
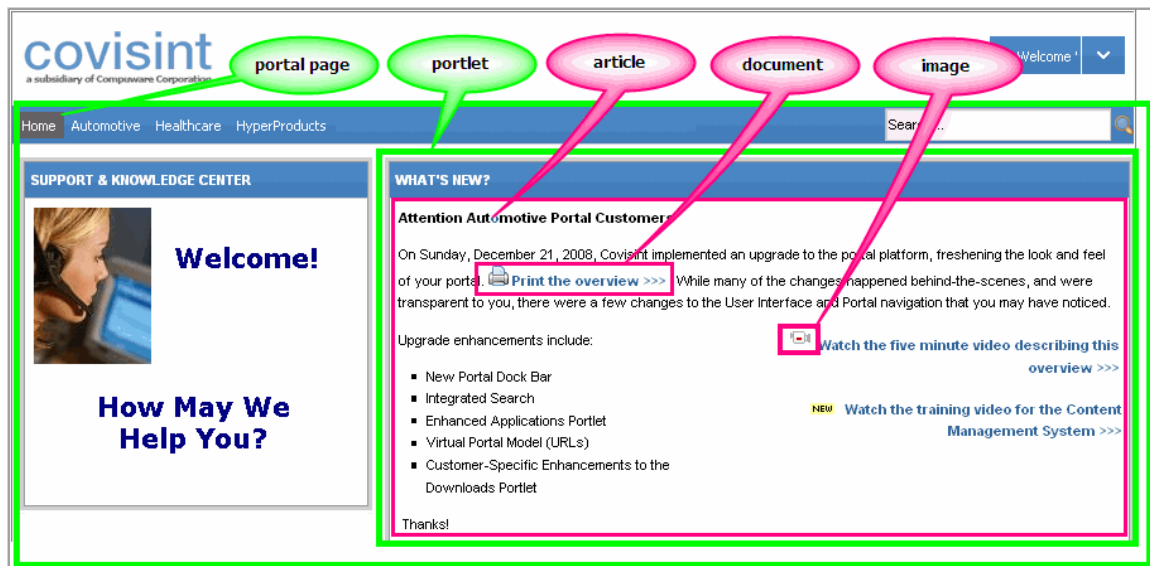
Using this example, there is a page on the Covisint portal called the "Home" page. On this page is a portlet called "What's New?". By default, pages and portlets are managed by your Portal Content Administrator.

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 document library. The web content also displays an image of a video camera. The image is stored in the Image Gallery. By default, web content and the documents and images within them, are managed by Content Managers.

To summarize, files that are stored in the *document library* and images stored in the *image gallery* 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.

TOGGLE EDIT CONTROLS

1. Click the **Welcome** menu (also known as the Portal Dock Bar).
2. Enable the checkbox next to **Toggle Edit Controls.** The screen refreshes and edit controls are displayed.
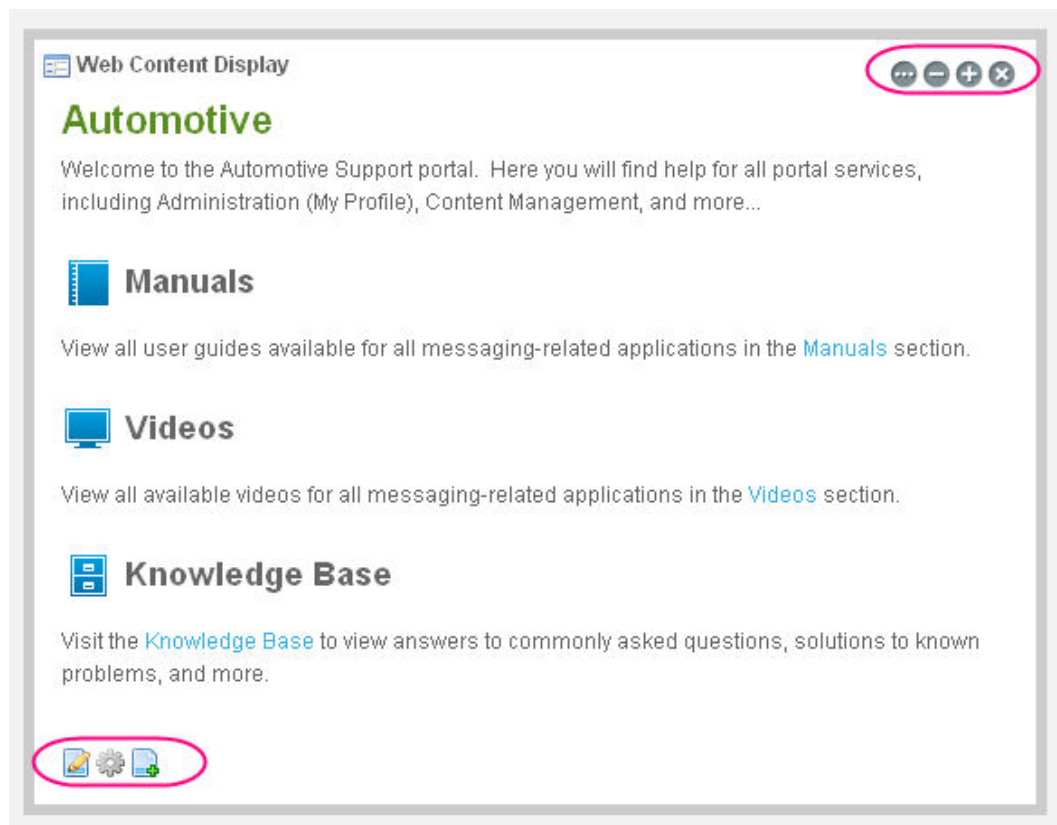
> Your view may show fewer edit controls, based on your user role in the Content Management System.

RESULT:
You have successfully enabled 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 Document Library, Image Gallery, and 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

Covisint Applications

Application 1

Covisint Content Management

Your Co. Content Management

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 Library*

- *Image Gallery*

- 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.

MANAGING WEB CONTENT

Web Content Administration Portlet Overview

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

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

- o Delete
- o Edit
- o Expire
- o Modify permissions (who can see the content)
- o Preview the content (prior to publishing)
- o Reinstate previous versions
- o Schedule date for publishing / removing content
- o View previous versions
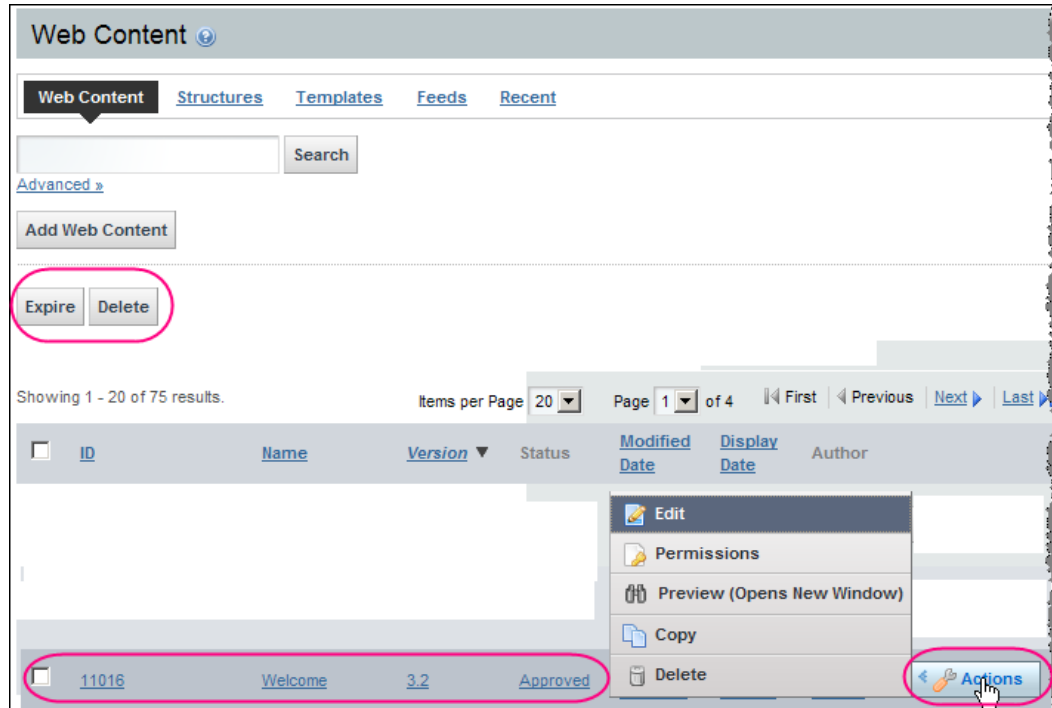
As shown in this example, the system auto-assigned an ID number (11016) to this web content when it was created. The current approved version is 3.2, and previous versions are stored in the system.

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 copy / paste out of other documents, such as a Microsoft Word document, into the WYSIWYG editor, IE will prompt you with a dialog box asking if the you want the system to "clean" up the code coming from the Office documents. **Allow the system to clean the code** in order for the pasted results to render appropriately.

- When attempting to paste 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 style sheet 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.

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.

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.

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 document library and image gallery. You are also able to upload new content to these document management portlets from the editor.

Editing Web Content with Preview

ℹ️ 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.

ℹ️ **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.

---
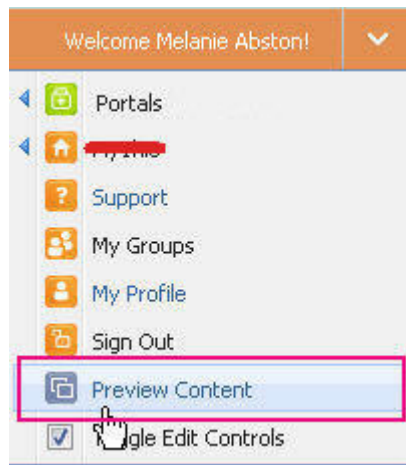
1. From the Welcome menu drop down, click **Preview Content.** The screen refreshes and is outlined in a thick red box to indicate preview mode.

2. Navigate to the web content you wish to edit.

3. Click ![edit icon] (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 Document Library, or another website. Learn more >>>

- select an image to display (stored in Image Gallery) Learn more >>>

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.

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

5. Click **Save as Draft.**

6. Click **Return**. 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 **Approve**. 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**. b. Click **Return** (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 **Advanced**. b. Click the twistie to display the scheduling options. c. Set the Display Date (this is the date the approved content will appear on the portal)

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

e. Proceed to step 9.
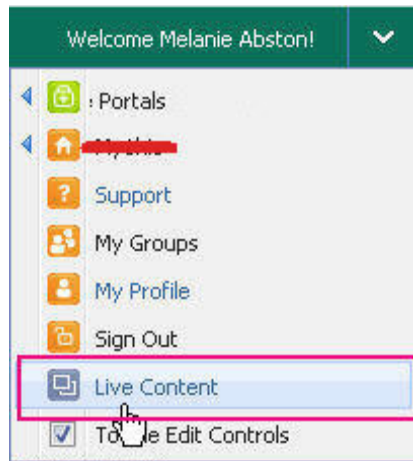
9. When ready, click **Approve** to publish the content to the portal.
10. From the Welcome drop down menu, click **Live Content.**

RESULT:

You have successfully previewed an article before publishing.

Creating a Link to a Document (already stored in Document Library)

Complete the following steps to add a link to a document that is already stored in the document library, within your web content article. If the document has not yet been uploaded to the Document Library, proceed to the topic titled Creating a link to a Document (not yet uploaded to Document Library).

1. Open the web content article in the editor.
2. Highlight the text you wish to link.
3. Click [icon].   The Link window is displayed.
4. Click **Browse Server**.
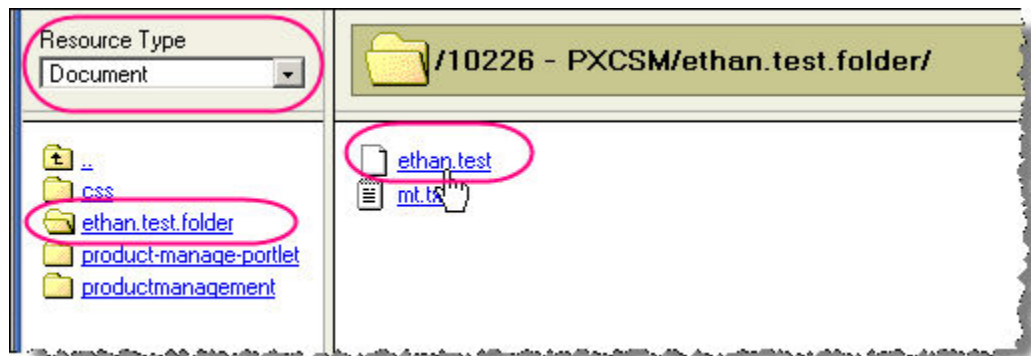
5. In the Resource Type drop down menu, select **Document**.
6. Drill down through the folders until you reach the document you wish to link. (This is a view of the folders in the Document Library).
7. Click on the ***document name***.   The document URL is displayed in the Link Info tab.
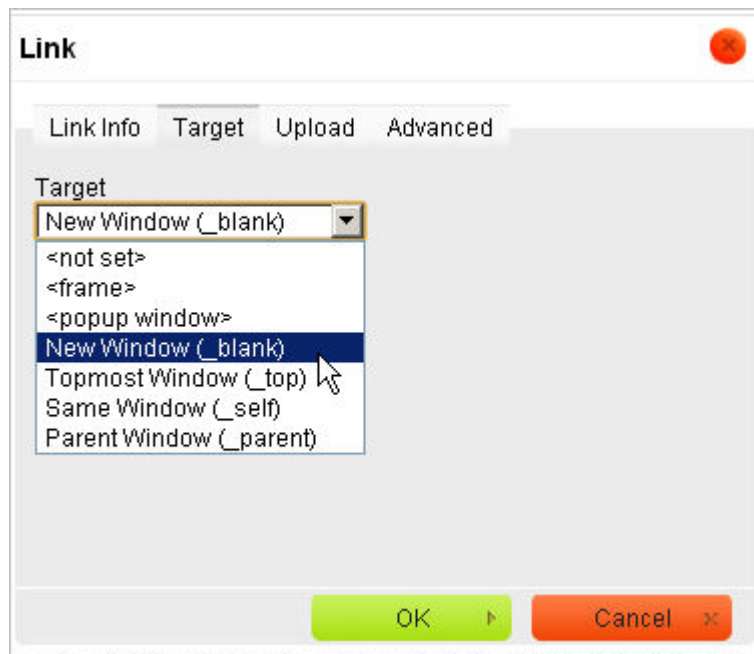
8. Click **Target,** and select the way in which the document should open (in a new window, in a pop-up window, etc.).

9. Click **OK**. The Link window is closed, and the hyperlink is created.

10. Continue editing the document as necessary.

RESULTS

You have successfully added a link to a document stored in the Document Library.

Creating a Link to a Document (not yet uploaded to Document Library)

Complete the following steps to upload a document to the document library, and create a hyperlink to it, from within the Editor view of a web content article. If the document has already been uploaded to the Document Library, proceed to the topic titled Creating a link to a Document (already stored in the Document Library).

1. Open the web content article in the editor.
2. Highlight the text you wish to link.
3. Click [icon]. The Link Editor window is displayed.
4. Click **Browse Server**.
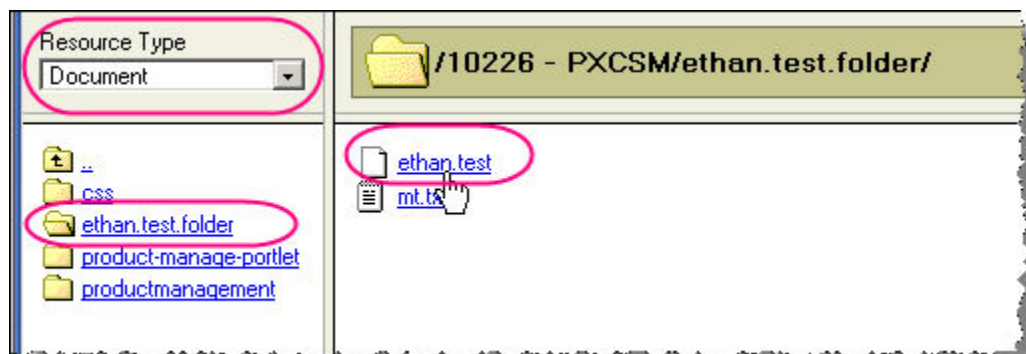
5. In the Resource Type drop down menu, select **Document**.
6. Drill down through the folders until you reach the folder in which you wish to upload the document. (This is a view of the folders in the Document Library).
7. Click **Choose Files.**
8. Browse your computer and click on the file you wish to upload.
9. Click **Upload.** The uploaded file is displayed in the Link Editor.

10. Click on the **document name**.   The document URL is displayed in the Link Info tab.
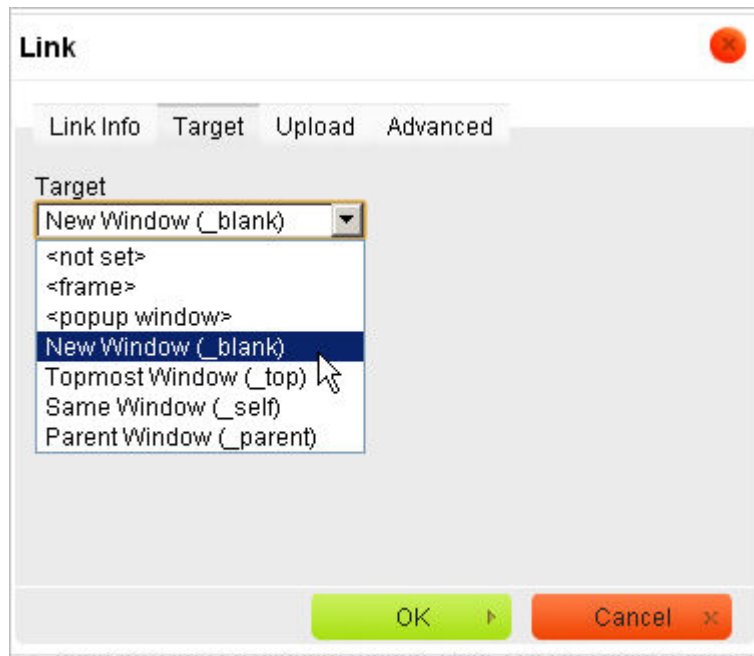
11. Click **Target,** and select the way in which the document should open (in a new window, in a pop-up window, etc.).

12. Click **OK**. The Link window is closed, and the hyperlink is created.

13. Continue editing the document as necessary.

RESULTS

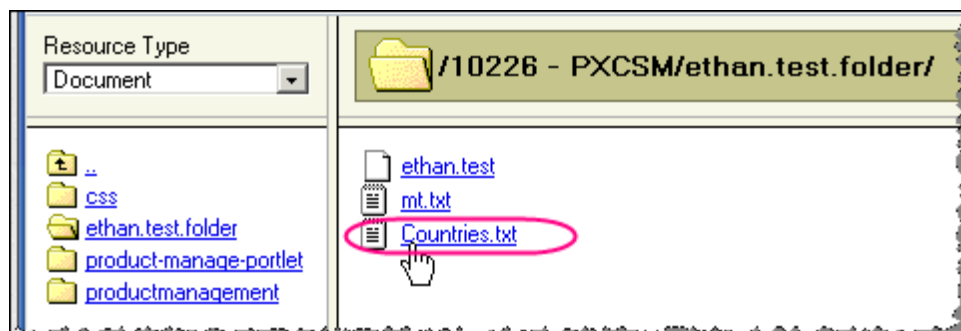You have successfully uploaded a new document to the Document Library, and created a hyperlink to it from within the Editor view of a web content article.
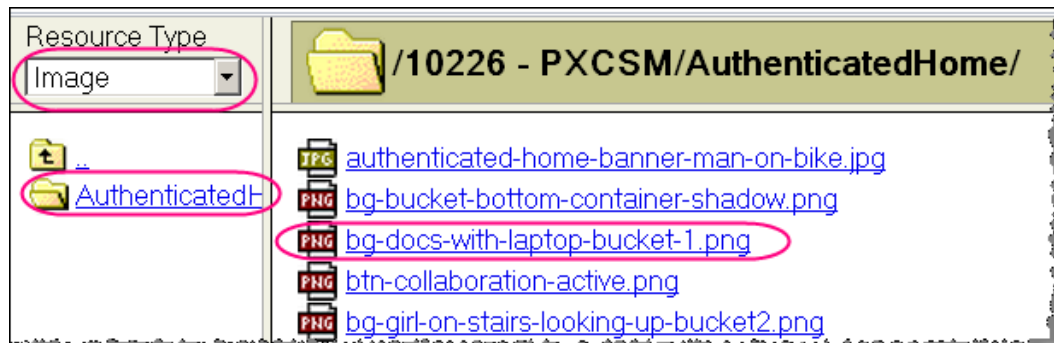
Displaying an Image in a Web Content Article

Complete the following steps to display an image in a web content article. If the image has not been uploaded to the Image Gallery, proceed to the topic titled Displaying an Image in a Web Content Article (and upload to image gallery).

1. Open the web content article in the editor.
2. Place your curser in the web content article where you wish to display the image.

3. Click [image] The Image Properties window is displayed.
4. Click **Browse Server**.

5. In the *Resource Type* drop down menu, select **Image**.
6. Drill down through the folders until you reach the image you wish to display. (This is a view of the folders in the Image Gallery).
7. Click on the ***image name***.   The image is displayed in the Image Properties window.
8. Click **OK**. The Image Properties window is closed, and the image is displayed in the editor.
9. Continue editing the web content as necessary.

RESULTS

You have successfully displayed an image in a web content article.

Displaying an Image in a Web Content Article (and upload to image gallery)

Complete the following steps to display an image in a web content article. If the image has not been uploaded to the Image Gallery, proceed to the topic titled Displaying an Image in a Web Content Article (already stored in the image gallery).

1. Open the web content article in the editor.
2. Place your curser in the web content article where you wish to display the image.
3. Click The Image Properties window is displayed.
4. Click **Browse Server**.

5. In the *Resource Type* drop down menu, select **Image**.
6. Drill down through the folders until you reach the folder in which you wish to upload the image. (This is a view of the folders in the Image Gallery).
7. Click **Choose Files.**
8. Browse your computer and click on the image you wish to upload.
9. Click **Upload.** The uploaded image is displayed in the Image Properties window.

10. Click on the ***image name**.*   The image is displayed in the Image Properties window.
11. Click **OK**. The Image Properties window is closed, and the image is displayed in the editor.
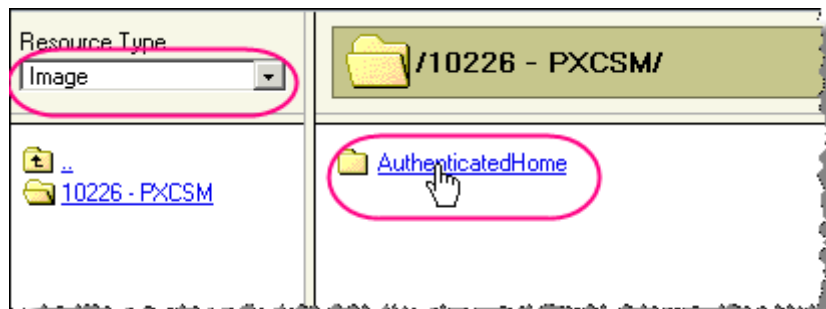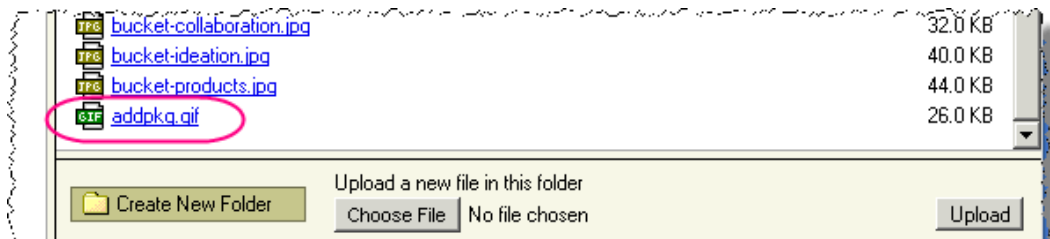12. Continue editing the web content as necessary.

RESULTS

You have successfully uploaded an image to the image gallery, and displayed the image in a web content article.

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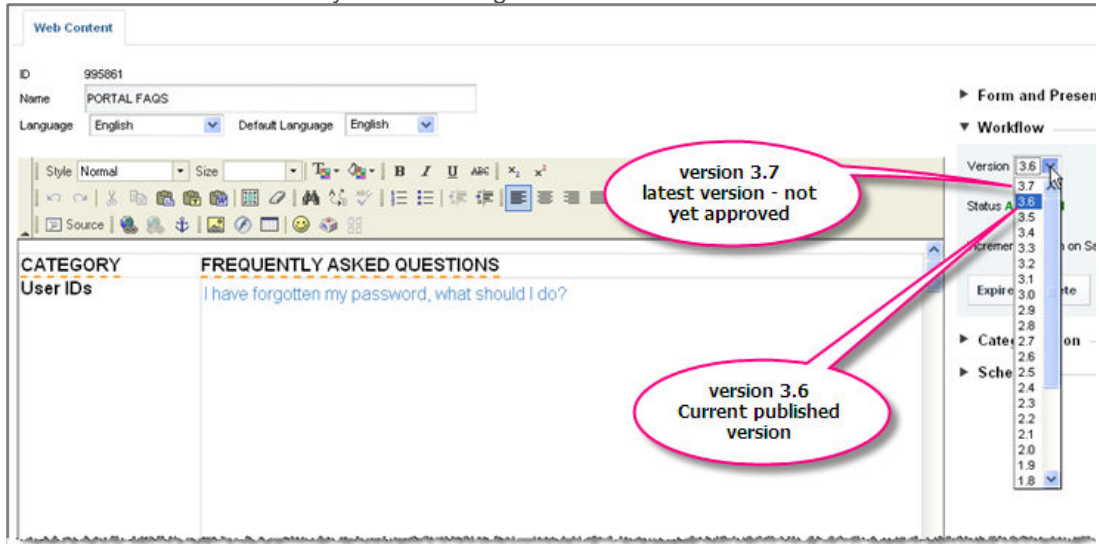
If you edit multiple articles in browser tabs, when you save or approve one of the articles, the action may be applied to all the articles.

---

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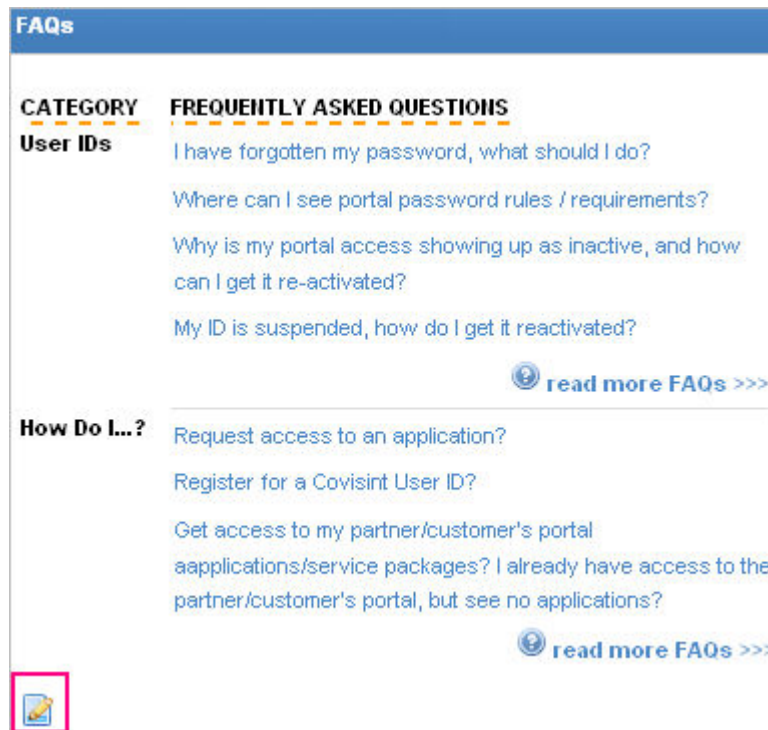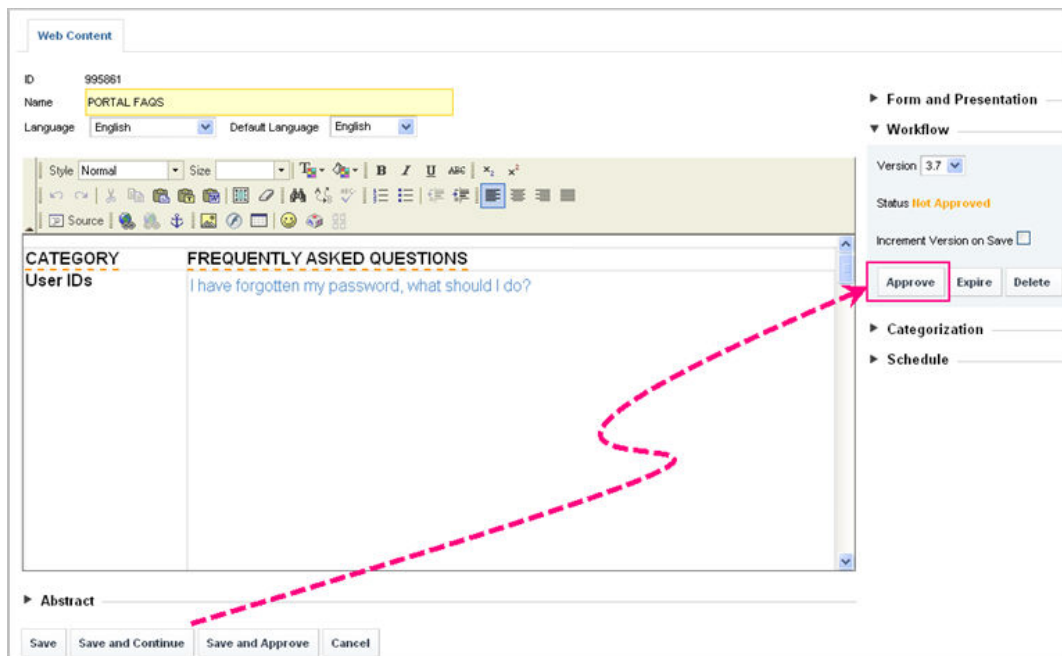

2. Click (edit icon).   The currently **published** version of the article is displayed in the built-in editor.   There may be more recent versions of the article that have not yet been published. Use the Versions drop down menu to validate that you are editing the intended version.   (If you do not 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 Versions drop down menu to validate that you are editing the intended version.

You will not see the option to "approve" until you click **Save and Continue.**

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 Document Library, or another website.

- select an image to display (stored in Image Gallery)

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

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

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

5. Perform one of the following:

IF YOU WISH TO...	THEN:
Approve and publish the content	a. Click **Save and Continue.** b. Click **Approve**. The screen refreshes, and a confirmation message is displayed. c. Click **Return.** 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 and Continue.** b. Click **Return**. The draft version is saved.

RESULT:

You have successfully edited an article.

Learning about Web Content Article Properties

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

ITEM:	NAME:	DESCRIPTION
1.	**File Name**	The name of the web content article as stored in the system. This name / name field is only visible to other Content Administrators.
2.	**Version**	Identifies the version number of the web content article.

ITEM:	NAME:	DESCRIPTION
3.	**Scheduling Options**	When desired, set a 'publish' date and an 'expiration' date. If you set a publish date, this is the date when your approved content will be published on the portal. If you set an expiration date, this is the date your content will be expired from the portal page, but will remain stored in the system (available only to Content Administrators).
4.	**Publishing Options**	*Save* - Enables user to save changes, and closes the editor. *Save and Continue*- Enables user to save changes, and continue working in the editor. *Approve* - the final step in publishing content on the portal. Once content is final, click Approve to display it in the portlet in which it was selected. (Approve button does not display until after you click Save and Continue.) *Cancel* - Cancels all edits that have occurred since the last save, and closes the editor.

Granting / Modifying Permissions on a Web Content Article

1. Access the Web Content Administration Portlet.

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

3. In the Web Content Admin Portlet, navigate to the web content article for which you wish to grant or modify permissions.
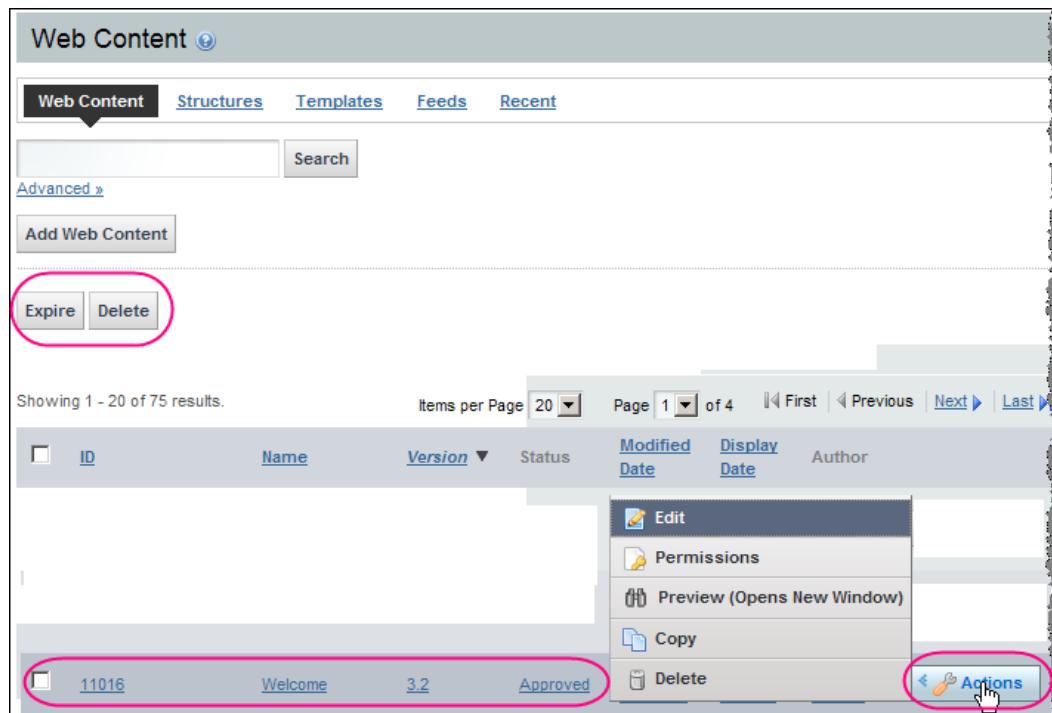
4. Click **Actions**.

5. Click **Permissions**.

Content Publisher Role

6. Enable the permissions for each role as desired by checking the appropriate boxes.
    View user role definitions >>>

7. Turn off permissions per role as necessary by removing the checkboxes as appropriate.

8. Click **Save**. The screen refreshes, and permissions are applied to the article.

> ℹ️ 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

RESULT:

You have successfully modified permissions of an article.

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 6.0 browser's security restricts a user from pasting content copied to the clipboard directly into the editor. *Why is only Internet Explorer 6.0 specified here?*

Complete the following steps to modify Internet Explorer 6.0 browser security setting.
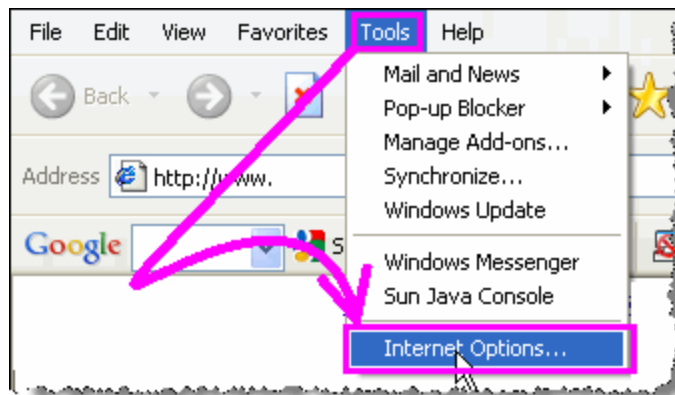
1. From Internet Explorer 6.0 Browser toolbar, click **Tools**.

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.
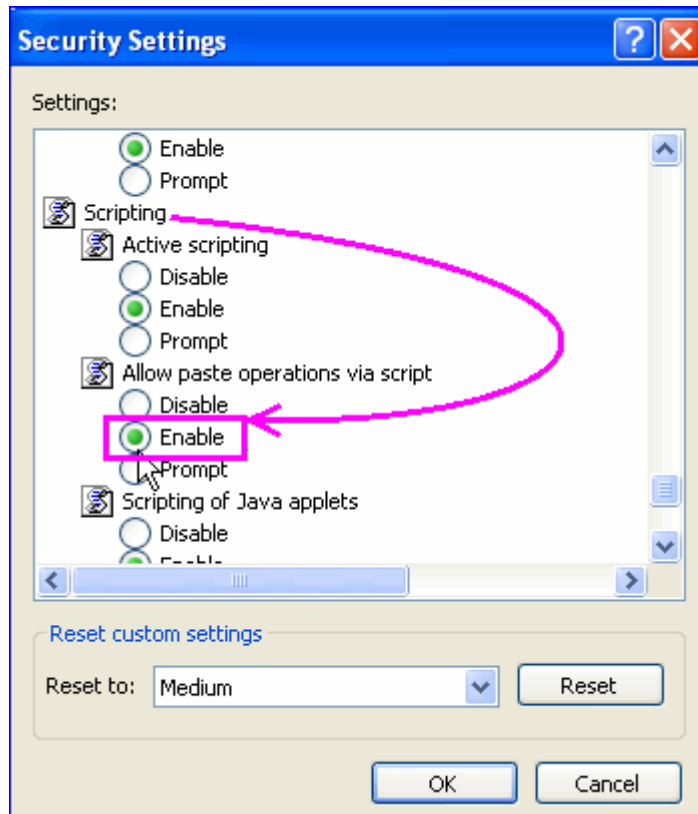
5. Scroll down through the options to the Scripting option, and click the **Enable** the radio
    button for the option of: **Allow paste operations via script.**

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.

RESULT:

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
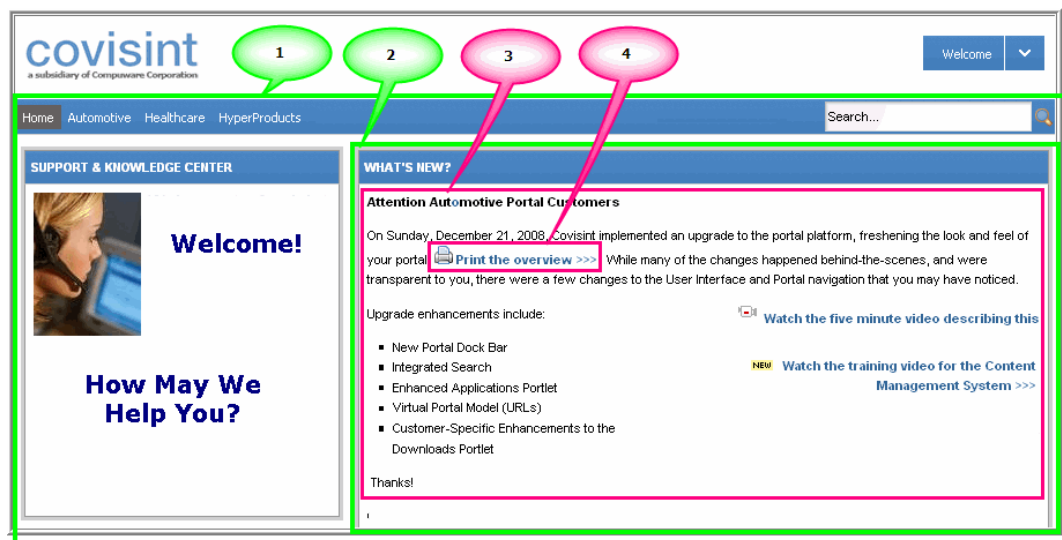
Unless your Administrator has changed the default settings, then:

- 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)
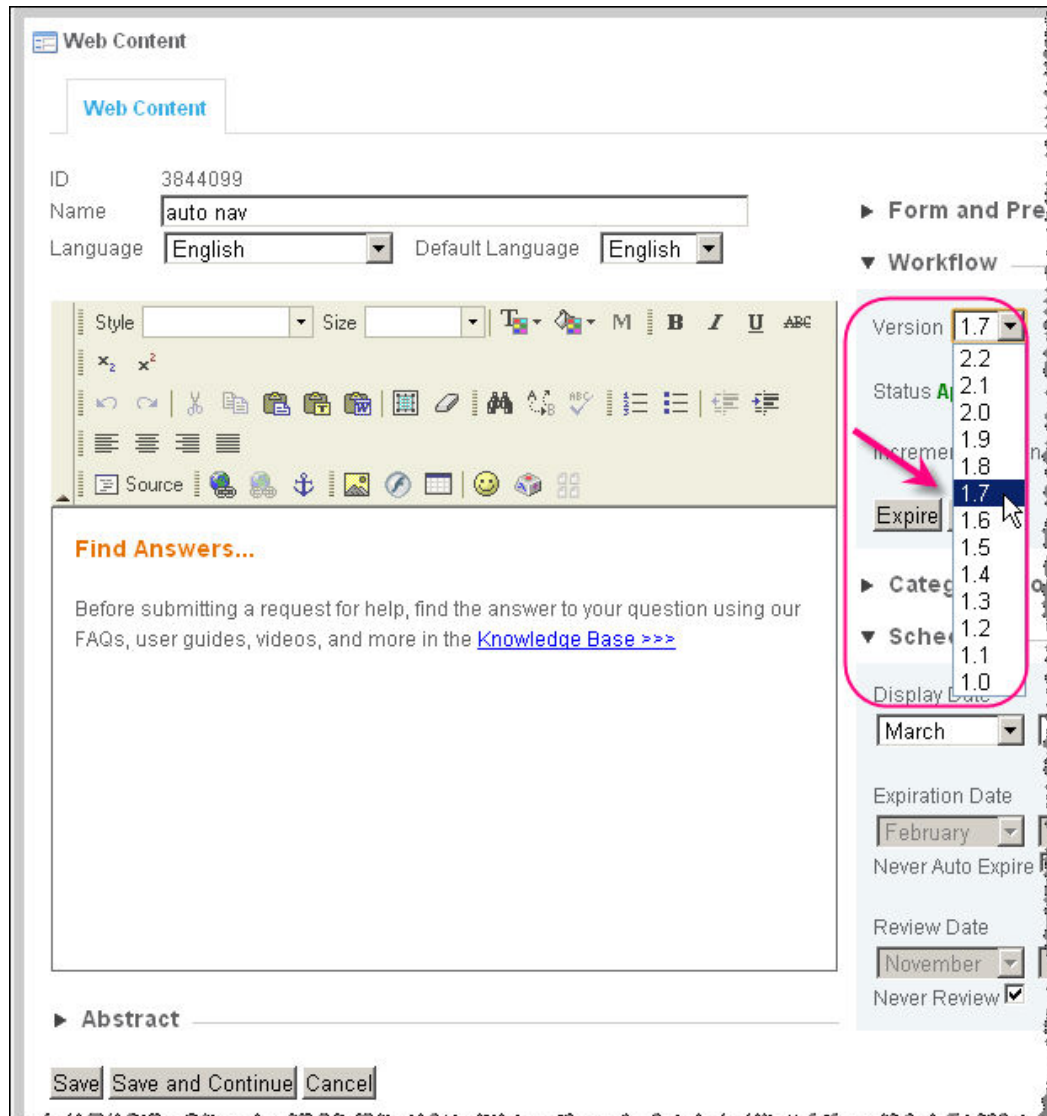
Portal Roles Defined

The following roles are the standard, default roles applicable to your portal. Privileges per role are applied to portal pages, portlets, articles, documents, and images. Your organization may also have added custom roles, with specified privileges.

ROLE NAME	DEFINITION
Guest	Non-authenticated access. Users do not need to be logged in to the portal to view/access pages, portlets, articles, images, or documents.
Owner	The authenticated user that created the item.
User	Authenticated Access - Users must be logged into the portal to view/access pages, portlets, articles, images, or documents

Reinstating a Previous Version of an Article

1. Navigate to the web content article you wish to reinstate.

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).

3. From the version drop down menu, select the version you wish to reinstate. (This example reinstates previous version 1.7)

4. Click **Save and Continue.**

5. Click **Approve**. The web content is published, and a new version (2.3 in this example) is created.

RESULT:

You have successfully restored a previous version of web content. The previous version is published to the portal as a new version.

Searching / Viewing a Web Content Article

1. Access the Web Content Administration Portlet.

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

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

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

4. Click **Actions**

5. Click **Preview**.

RESULT:

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

MANAGING THE IMAGE GALLERY

Image Gallery Overview

Like the Document Library, the Image Gallery provides a centralized repository for images used throughout the Portal. A unique URL is assigned to each image. Through the Image Gallery, you are able to add and manage images, and reference the image (by referencing the image's unique URL).

Adding an Image to the Image Gallery

Complete the following steps to add an image to the image gallery portlet.

1. Access the Image Gallery.

2. Navigate to and *click on the folder* in the Image Gallery in which you wish to add an image.

> **i** Note: Images can only be uploaded into a folder. If necessary, create a folder before uploading an image.
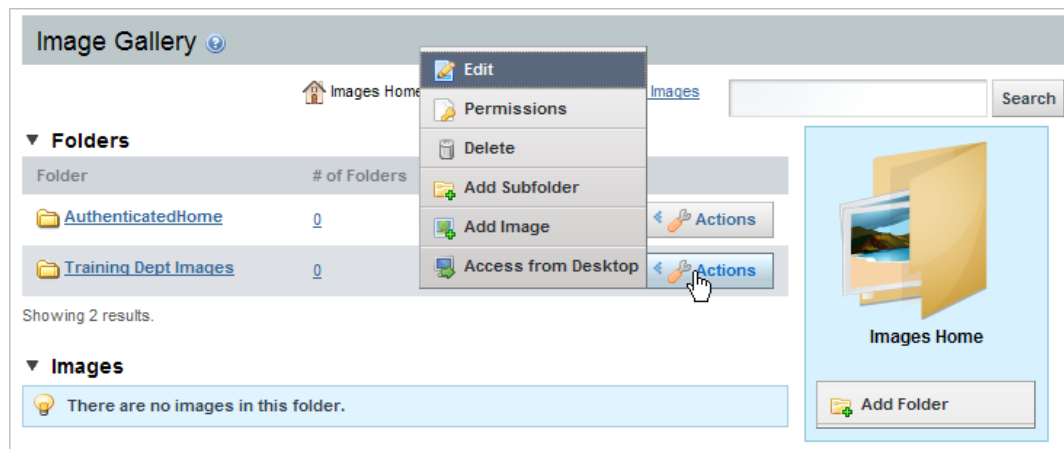
3. Click **Actions**.

4. Click **Add Image.**

5. **Browse** and select the image to upload.

6. Key in an image name, and an easily identifiable description for the image in the open text fields.

7. Click **Save**. After saving, you are returned to the folder in which you saved the image.

RESULT:

You have successfully added an image to the image gallery.

Folders

Creating a Folder

1. Access the Document Library or Image Gallery to add a folder. (This example uses the Document Library.)

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

3. Key in the *Name* of the folder.

4. Optionally, modify permissions on this 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.

RESULT:

You have successfully created a new folder in either the Document Library or Image Gallery.   Next, you may wish to add a document or add an image to the folder.

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 Document Library or Image Gallery to add a folder.
2. Navigate to the folder you wish to delete.

3. Click **Actions**.
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.)

RESULT:

You have successfully deleted a folder.

MANAGING THE DOCUMENT LIBRARY

Document Library Overview

Content Publisher Role

Covisint's Document Library is a part of the document management functionality (as is the Image Gallery) provided by Covisint's Content Management System.

The Document Library provides a centralized repository for various document types (e.g., .PDF, .DOC, .XLS, etc.) to be stored, and a unique URL is auto-assigned to each of them. An organization running the Portal can protect and 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 unprotected PDF files of quarterly newsletters and their download links. Document protection is permission-based.

The Document Library supports multiple repositories that can be set with different access roles. Also, the documents in the repository are version-controlled, allowing an authorized user to retrieve any particular revision that has been stored on the system.
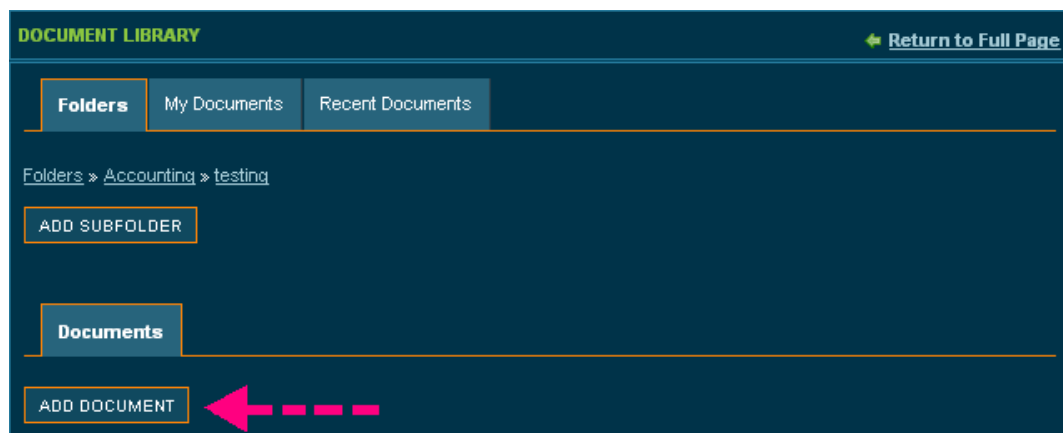
Files

Adding a Document

1. Access the Document Library.
2. In the Document Library, navigate to the folder in which you wish to add a document. (This example will add a file to the training folder).

> ℹ️ Note: You are not able to add a document to an empty Document Library portlet. Documents must be uploaded to folders. If a folder is not available, add a folder before proceeding with the steps in this section.

3. Click **Add Document**.
4. Click **Choose File** and select the file you wish to upload to the document library.
5. Key in the file name, description, etc. as desired.
6. Optionally, grant permissions on the document.
7. Click **Save**. The screen refreshes, and the file is uploaded to the folder.
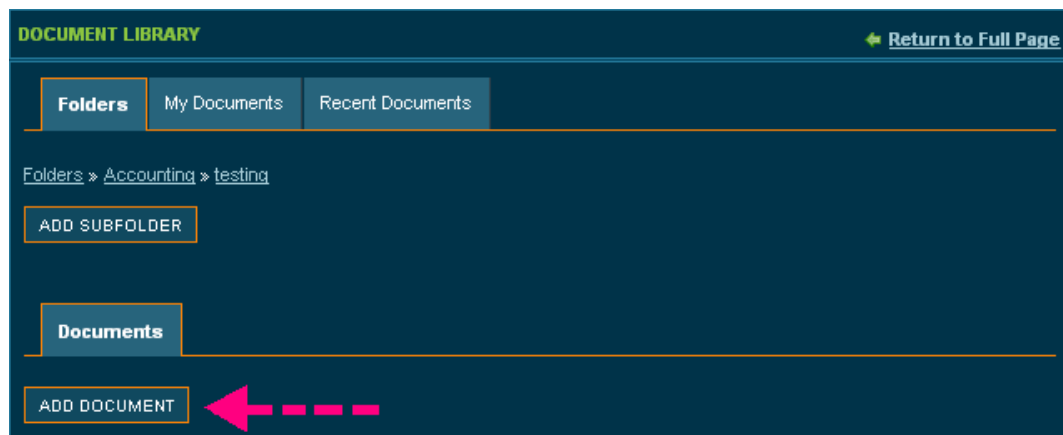8. Click **Return to Full Page.**

RESULTS

You have successfully added a document.

Adding Documents in Bulk

1. In the Document Library, navigate to the folder in which you wish to add many documents. (This example will add files to the 'testing' folder).

> ℹ️ You are not able to add a document to an empty Document Library portlet. Documents must be uploaded to folders. If a folder is not available, add a folder before proceeding with the steps in this section.

2. Click **Add Document**.
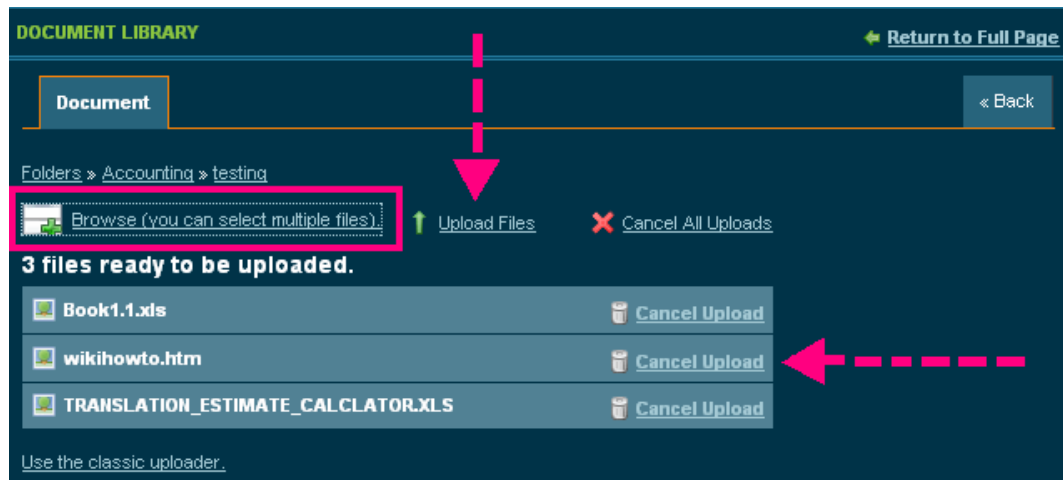
3. Click **Browse (you can select multiple files)** and select the file(s) you wish to upload to the document library.
4. Click **Upload Files**. The screen refreshes, and the files are uploaded to the folder.

5. Click **Return to Full Page.**

6. Grant permissions on each document.

You have successfully added documents in bulk. Next, grant permissions on each document.
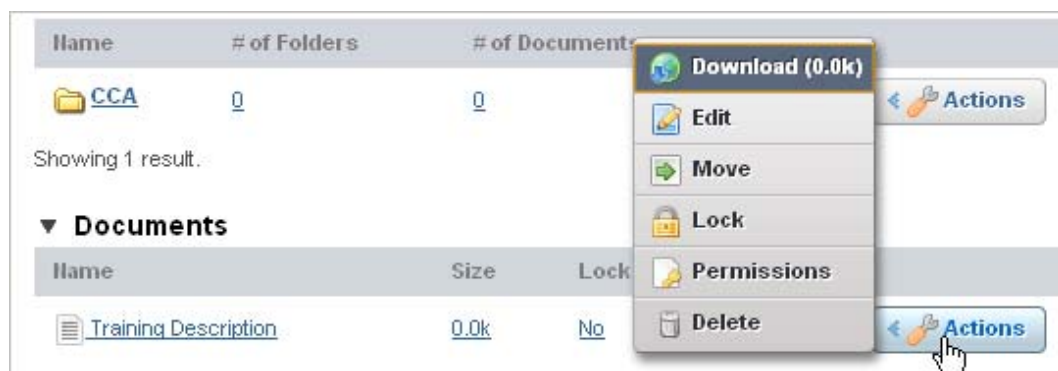
Deleting a Document

Complete the following steps to delete a document from the document library repository. Performing the steps below will permanently delete the active version plus all previous versions of the document.

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

1. Access the Document Library.
2. Navigate to the document you wish to delete.

3. Click **Actions**.
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.)

RESULT:

You have successfully deleted a document.

Editing a Document

Complete the following steps to edit a document stored in the Document Library. The following steps for editing include locking the document to prevent others from making changes to it while you are working on it.

> **i** Note: You are able to take a shortcut to editing a document and bypassing the lock/unlock 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 Document Library.
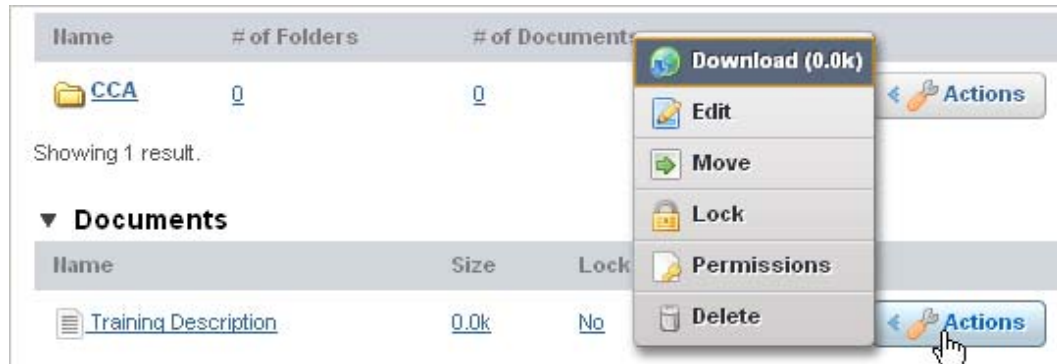2. Navigate to the document you wish to edit.
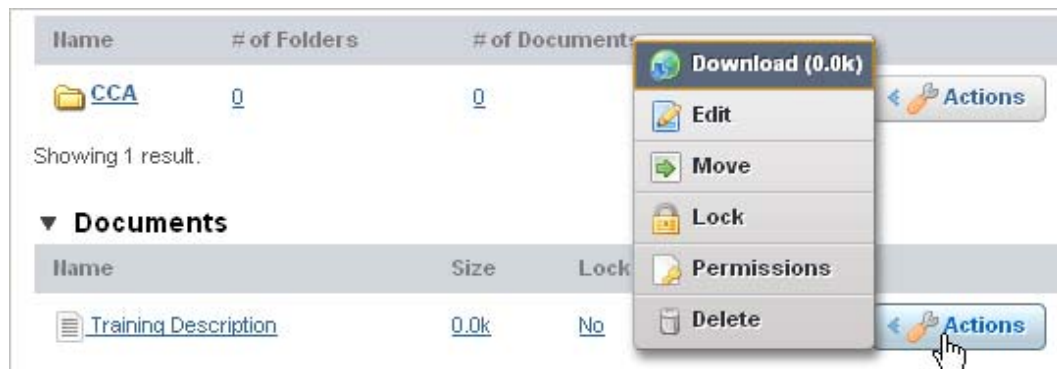
3. Optionally, lock the file to prevent others from editing it while you are working with the file.
4. Click **Actions**.
5. Click **Download** (to download the file to your desktop), and save the file to your desktop.
6. Edit as necessary (outside of the CMS system) and save the file (outside of the CMS system).
7. Navigate to the file in the document library.
8. Upload the edited version of the file by clicking **Actions** next to the file name.
9. Click **Edit**.
10. Click **Choose File** and select the edited document you wish to upload to the portal.
11. Scroll to the bottom of the screen and click **Save**. The screen refreshes and the edited file is uploaded.
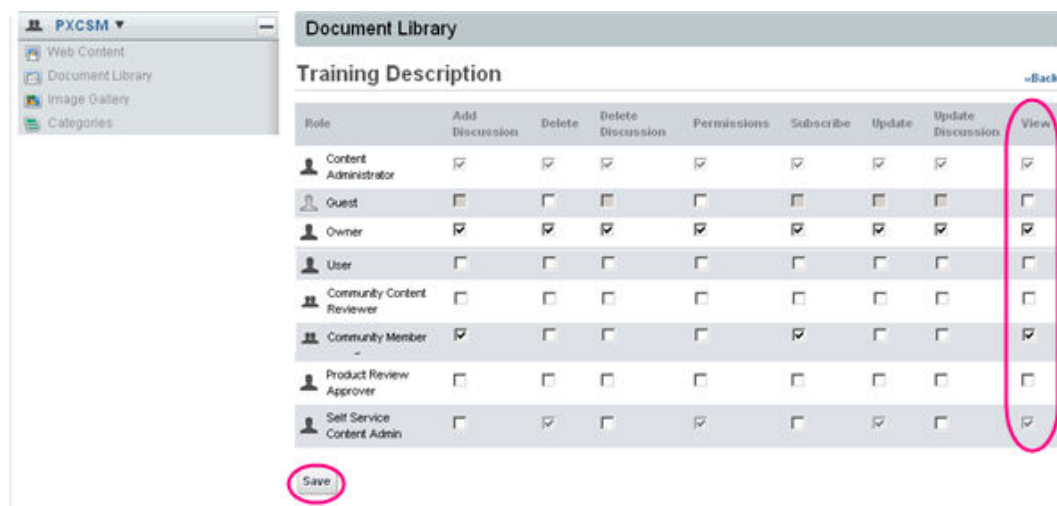12. Unlock the document (if necessary).

RESULT:

You have successfully edited a document.

Granting / Modifying Permissions on a Document

1. Access the Document Library.

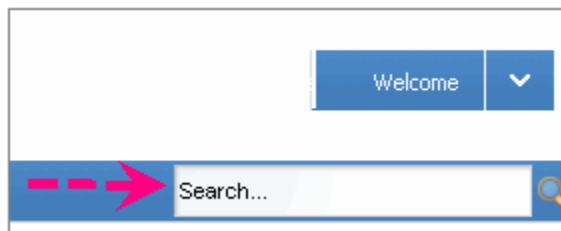2. Navigate to the document for which you wish to modify permissions.

3. Click **Actions**.

4. Click **Permissions**.

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

> ℹ️ 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.
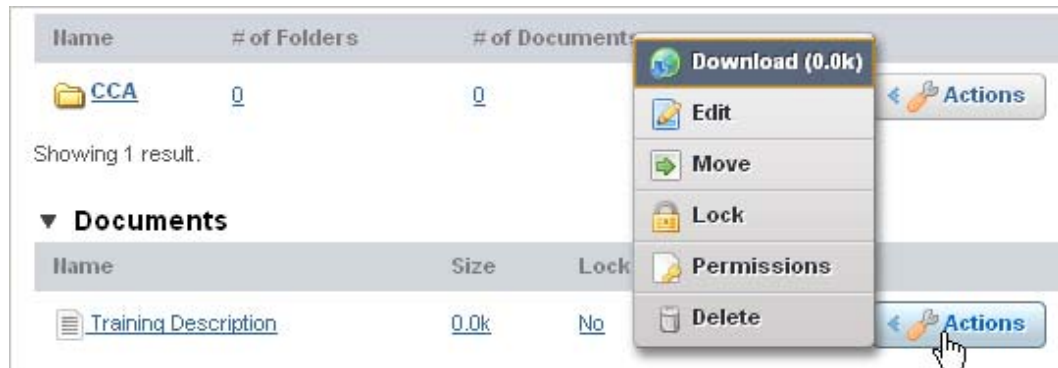
7. Click **Save.**

RESULT:

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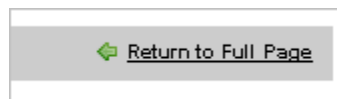
Locking a Document

Prevent others from editing a document by locking the file.

1. Access the Document Library.
2. Navigate to the document you wish to lock.

3. Click **Actions**.
4. Click **Lock.** The screen refreshes and the document is locked.
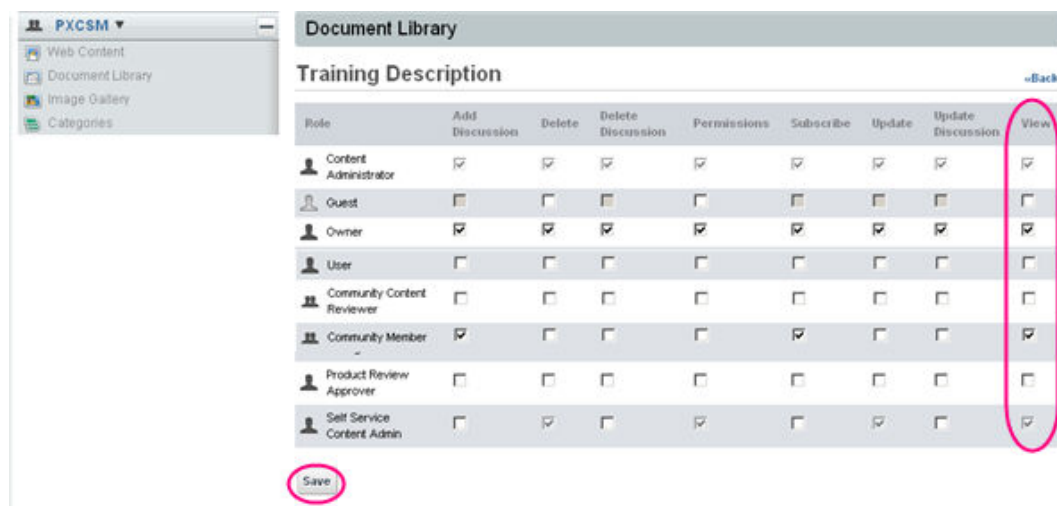5. Click **Return to full page.**

You have successfully locked a document.

Granting / Modifying Permissions on a Document

1. Access the Document Library.

2. Navigate to the document for which you wish to modify permissions.

3. Click **Actions**.

4. Click **Permissions**.

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.
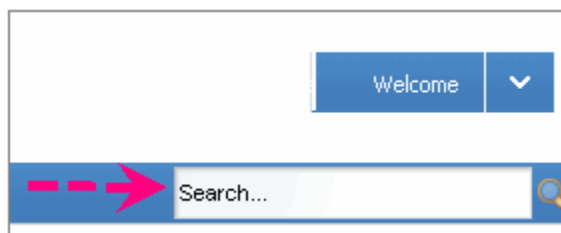
● view permission on document
● view permission on article
● view permission on portlet
● view permission on page

6. Turn off permissions per role as necessary by removing the checkboxes as appropriate.

7. Click **Save.**

RESULT:

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

Moving a File to a New Folder

Your role may / may not have permission to move a file.

1. Navigate to the file you wish to move in the Document Library. This example moves the file "testresults.txt" out of the folder called "training" and into the "tests" folder.

2. Click **Actions** for the document you wish to move.
3. Click **Edit**. The Edit 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.

6. Click **Choose** in the row of the folder you wish to select as the new target folder (tests folder, in this example).

7. Click **Save**. The screen refreshes, and the file is moved to the new folder location.

RESULT:

You have successfully moved a file to a new folder.

Portal Roles Defined

The following roles are the standard, default roles applicable to your portal. Privileges per role are applied to portal pages, portlets, articles, documents, and images. Your organization may also have added custom roles, with specified privileges.

ROLE NAME	DEFINITION
Guest	Non-authenticated access. Users do not need to be logged in to the portal to view/access pages, portlets, articles, images, or documents.
Owner	The authenticated user that created the item.
User	Authenticated Access - Users must be logged into the portal to view/access pages, portlets, articles, images, or documents

Reinstating a Previous Version of a File

1. View the previous version.

4. Click the **download** icon for the version of the file you wish to reinstate and save it to your desktop.

5. Navigate back to the folder in which the file is stored in Document Library.

6. Upload the new version of the file. The previous version is stored as the active version, and assigned a new incremental version number.
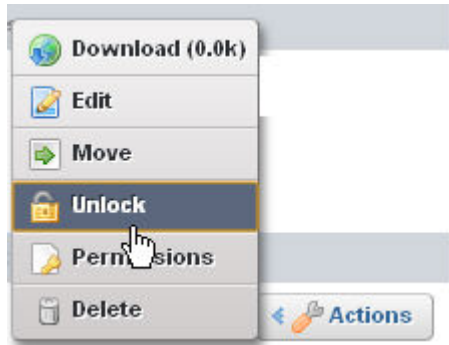
RESULT:

You have successfully reinstated a previous version.

Unlocking a Document

Allow others to edit a document by unlocking the file.

1. Access the Document Library.
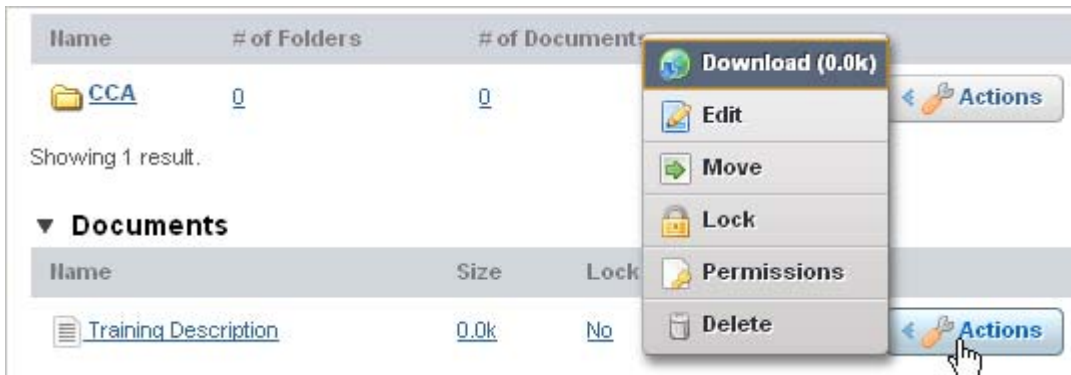2. Navigate to the document you wish to unlock.

3. Click **Actions**.
4. Click **Unlock.** The screen refreshes and the document is unlocked.

RESULT:

You have successfully unlocked a document.

Uploading a New Version of a Document

1. Access the Document Library.

2. Navigate to the document you wish to upload a new version.

3. Click **Actions**.

4. Click **Edit**.

5. Click **Choose File,** 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.

RESULT:

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 Document Library.

2. Navigate to the document you wish to view previous versions in the Document Library.

▼ **Documents**

Name	Size	Locked	
📄 Training Description	0.5k	No	◀ 🔧 **Actions**

3. Click **Actions** for the document you wish to view previous versions.
4. Click **Edit**. The Edit screen for the file is displayed.
5. Scroll to the bottom of the screen, and view previous versions.

▼ **Version History**

Version	Date	Size	Status	Download	
1.1	2/8/12 2:09 PM	0.5k	Approved	📄 TXT	🗑 Delete
1.0	2/8/12 1:18 PM	0.0k	Approved	📄 TXT	🗑 Delete

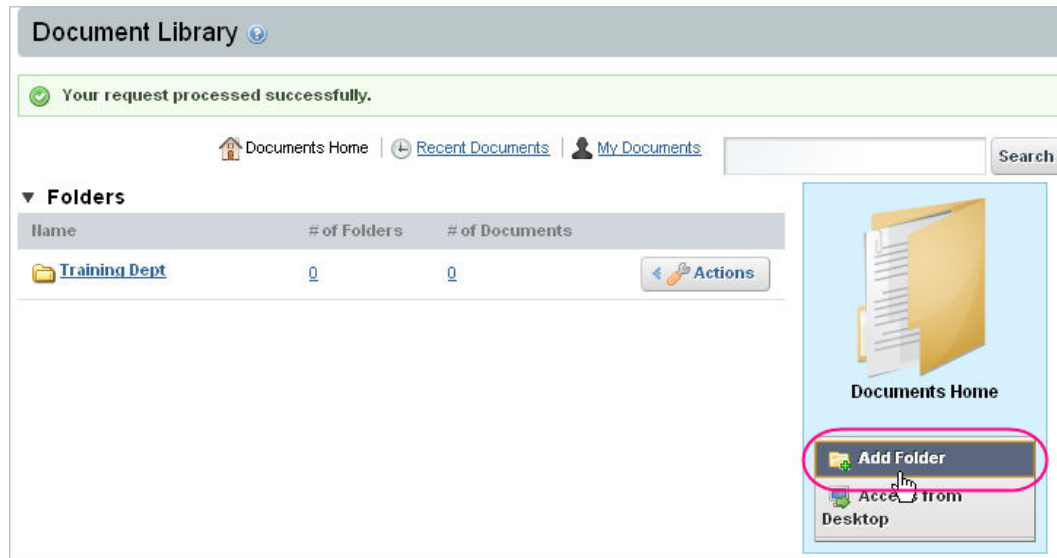4. Click on the version number you wish to view.

RESULTS

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

Folders

Creating a Folder

1. Access the Document Library or Image Gallery to add a folder. (This example uses the Document Library.)

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

3. Key in the *Name* of the folder.

4. Optionally, modify permissions on this 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.

RESULT:

You have successfully created a new folder in either the Document Library or Image Gallery.   Next, you may wish to add a document or add an image to the folder.
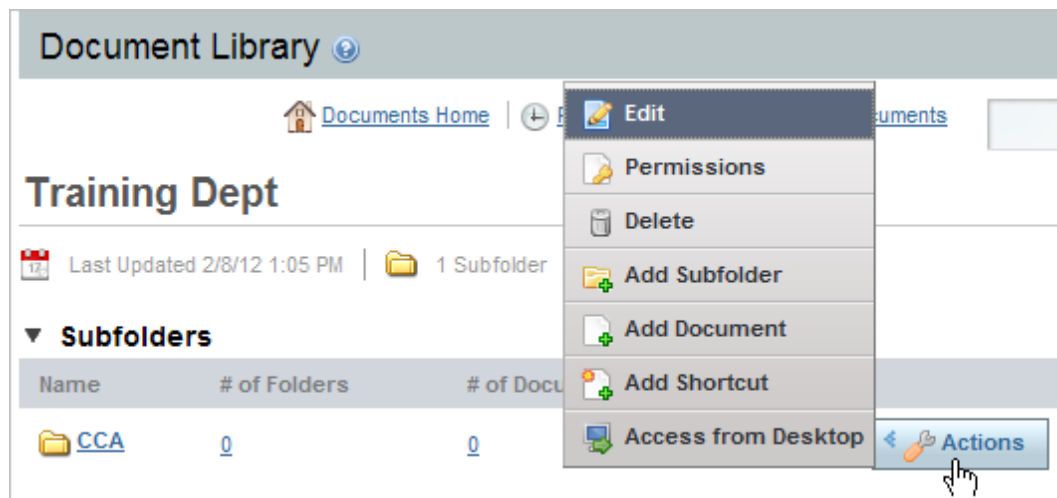
Deleting a Folder

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 Document Library or Image Gallery to add a folder.
2. Navigate to the folder you wish to delete.

3. Click **Actions**.
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.)

RESULT:

You have successfully deleted a folder.