Portal Prodigy™

Document Resource Library in Detail

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1.1 Introduction

Maintain a visitor friendly cataloged, searchable and browse-able document library that includes documents stored in their original file formats such as HTML, DOC, JPG, MPG, PDF, TXT, etc.. A database record with descriptive information and administrative controls is created for each document imported into the website. Documents can be assigned viewing security levels, expiration dates, catalog locations, topics, and index keywords and phrases. The Document Library can serve as a knowledgebase for visitors and as an organizational store house for unlimited website pages. Its powerful version control features allow many different team members to work on the same document and maintain a trail or history of revisions. It's easy for permitted users with no website or HTML programming experience to import documents directly from their computer or network into the organization's website. Documents created in MSWord, Publisher, and other desktop publishing software, are quickly made a part of your website with no programming required.

The PortalProdigy Resource Library provides your organization with a centralized knowledgebase accessible to permitted users 24 hours per day, 7 days per week, 365 days per year. It includes everything you need to manage and provide online access to your organization's digital content including documents, images, Web pages, audio, video and application specific files. You can use the PortalProdigy Resource Library for storage and retrieval of Best Practices, Operation Manuals, Tutorial Guides, Technical Specifications, CAD Drawings, Schematics, Spreadsheets, White Papers, Case Studies, Pictures, Agreements, Contracts, Forms, Marketing Materials, Information on Specific Topics, Proposals, RFP's, Fact Sheets, Brochures, Resource Guides, Software Downloads, Articles, and more.

The Document Resource Library benefits include:

- Document centric model that makes it easy to manage your website's content.
- Supports all file types including standards such as HTML (.htm), Adobe PDF (.pdf) Rich Text Format (.rtf), Word Document (.doc), Audio (.mp3) and Video (.mpeg).
- Separation of public content from private content. Individual documents (files) and folders can be secured, permitting access only to authorized users.
- Secure collaborative workspaces for sharing documents and files amongst members of a group.
- Complex version control, checkout and update controls allowing many different team members to work on the same document and maintain a trail or history of revisions
- Library checkout and check-in feature to track if document is currently being edited and by whom.
- Approval processing option that places newly submitted documents into a submission queue pending authorization. Once authorized, documents are made accessible in the Resource Library. Automated notification is sent to submitters of rejected documents.

- Special support for HTML web pages to include the web page's related files such as images, style sheets and scripts.
- Integrated easy to use document editor for editing HTML and Text documents. Allows creation and editing of web pages (documents) without knowledge of HTML.
- Authorized visitors can retrieve documents by browsing categories, searching on keywords and via links embedded in other pages and menus throughout your website.
- Search results are enumerated and easy to navigate.
- Automated expiration option deactivates documents based on specified expiration date.
- Viewer tracking reports statistics on who, when and what has been viewed.
- Integration of documents with Event Registration, Membership Signup and Product Catalogue to display and manage Brochures and other related documents.
- Integration of documents in Mini Browsers and Menus to provide direct links to documents.

Some of the components, fields and settings of the Documents feature, discussed in detail in this chapter, are:

Resource Category Management page:
Name
Description
Created By
Modified By –
Active
ChapterID
Private

Search For Documents page:
Include deactivated records in search results:
Document Category
Document ID
Created Date Range
Modified Date Range
Topics
Items Per Page
Categories
Quick Search on Document Title

Document Management page:
Document ID
Document Title
Document Description
Keys
Append Document
Use Template
Include Link On Home Page
Home Page Sort Order
Use
Upload Image
Created By
Modified By
Active
Expires Date
ChapterID
Topic
Private

Document Editor
Style
Paragraph .
Font
Size
Bold
Italic
Underline
Superscript
Subscript
Strikethrough
Left Justify
Center Justify
Right Justify
Numbered List
Bullet List
Increase Indent
Decrease Indent
Cut
Copy
Paste
Undo Typing
Redo Typing
Font Color
Background Color
Insert Table
Insert Image
Insert Link
Insert Rule
Print
HTML
Option Buttons

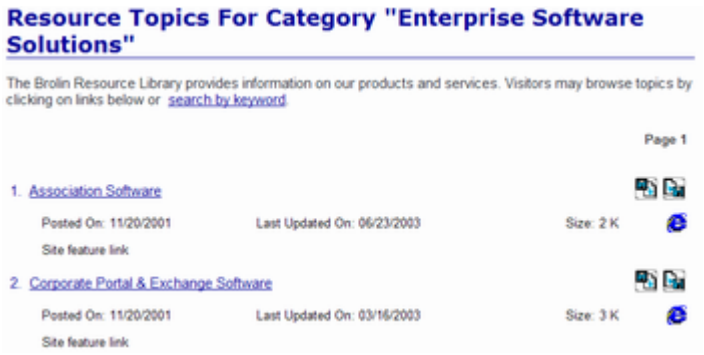
Please note that we use two different terms to refer to the files that are managed and made available by the Resource Library. In the Visitor User Interface we refer to files as Resources; whereas, in the Administrative User Interface we refer to files as Documents. The term Resources is used in the Visitor User Interface because it best describes the purpose to a broad audience who does not posses the training advantage of a PORTALPRODIGY Certified Administrator. The term Documents is used for Administrators in order to conform with industry standard terminology for repository based models like PORTALPRODIGY. It also helps to avoid confusion with file management tools such as Windows Explorer.

1.2 The Visitor Experience

Authorized visitors can retrieve documents by browsing categories, searching on keywords, and via links embedded in other pages and menus throughout your website. Permitted users may also add documents.

The Browse Resource Topics Categories page lists each Category as a link along with a brief (optional) description of the Category.

The visitor selects a Category by clicking on the Category name. The Resource Topics for Category then lists all documents (files) for the selected Category.



The visitor clicks on a document name to access the document. Depending on the document (file) type and configuration of the visitors computer, the document is either displayed in their browser, opened in the documents source application or downloaded as file to the visitor's computer.

If the visitor has the necessary security rights they may Check-in and Check-out and add new Add Document documents.

The visitor may also search for documents using keywords.

Documents (files) with matching keywords are displayed as follows:

When no matching documents are found the following message is displayed.

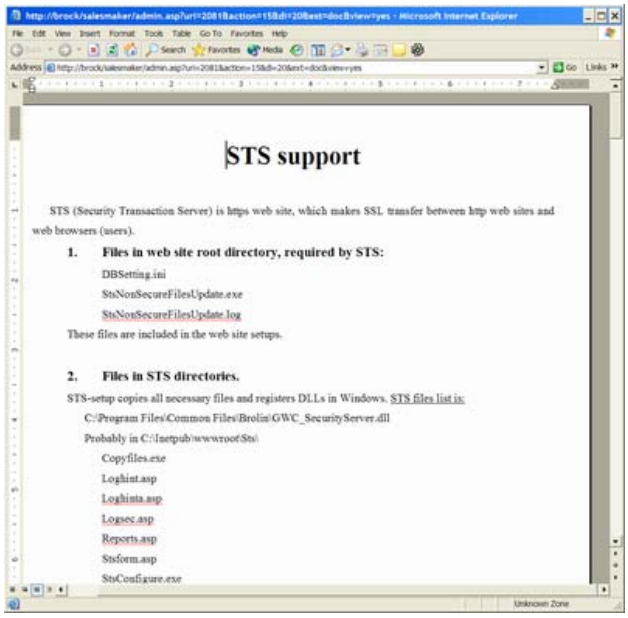
When the Visitor clicks on a document link (the document name), the Visitor will be presented with one of the following:

The document displayed within the content section of the current browser window surrounded by the Website's template as shown below:

Or the document displayed in a new browser window without the Website's template as shown below:

Or a dialog box asking the user to open or save the document as shown below (this is dependent on the Visitor's type of computer and settings):

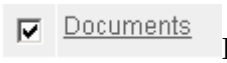
Or the document opened by the documents source application such as MS Word, Adobe Acrobat, etc. as shown below (this is dependent on the Visitor's computer settings):

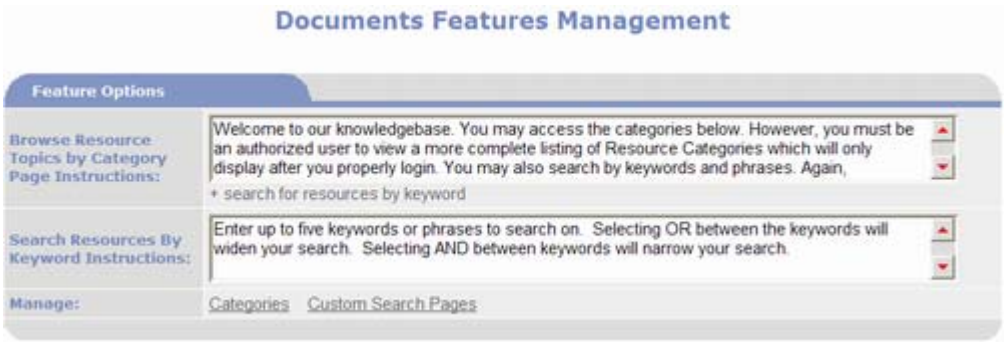


1.3 Components

This section describes the various components of the Resource Document Library.

1.3.1 Documents Features Management:

You can access the Documents Feature Management page by Clicking the Features Edit button located in the Site Management menu column of the Main Administration menu (Ctrl-Alt-m) and then check marking the  Documents feature activation box and then click on the **Documents** link.



- **Browse Resource Topics by Category Page Instructions** – used to define the instructions displayed on the Browse Resources by Category page. The link Search for resources by

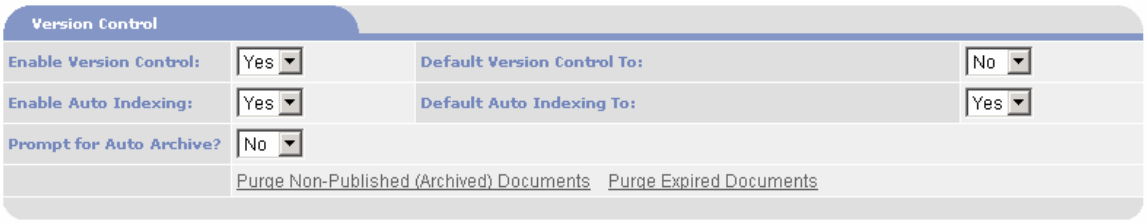
keyword is automatically inserted at the end of the instructions. This link takes the user to the Search Resources by Keyword page.

- **Search Resources By Keyword Instructions** – used to define the instructions displayed on the Search for Resources by Keywords page.
- **Manage** – links to add and manage the following:
  - **Categories Link** – click to display the Document Categories Management page to define categories for the Resource Document Library.
  - **Custom Search Pages Link** - click to display the Custom Search Pages Management page to define custom search pages.

Version Control

By enabling Version Control on the website, users are provided the ability to:

- Designate published version of a document.
- Undo changes by reverting to previous version.
- Collaborate and approve changes prior to posting.
- Archive and view history of document changes.
- Approve and decline documents or versions.
- Notify administrator of document pending approval.
- Command selected documents to open in a new window.

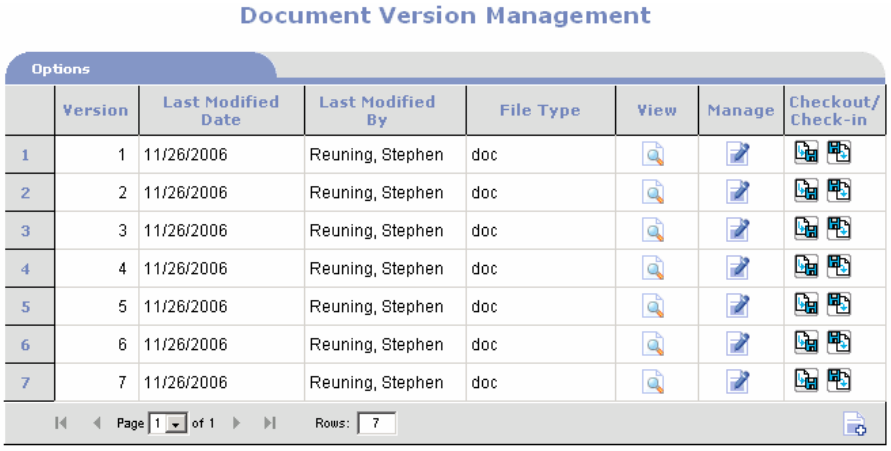


- **Enable Version Control Field –** This field can be set to *Yes* or *No*. When set to Yes, multiple versions of a single document may be saved.
- **Default Version Control To Field –** When individual documents are created and saved to the website, the value of the Version Control field will be initially set to the value selected here.
- **Enable Auto Indexing Field** - *Auto Indexing is an optional feature that may be purchased in addition to the standard PortalProdigy license.* If the feature is licensed and

installed, then enabling auto indexing allows the system to index the entire text of any DOC, RTF, PDF, TXT, HTM, or HTML document for searching purposes. The system behaves as if all the words composing the document were listed in the Keywords field of the Document Management page of the corresponding document.

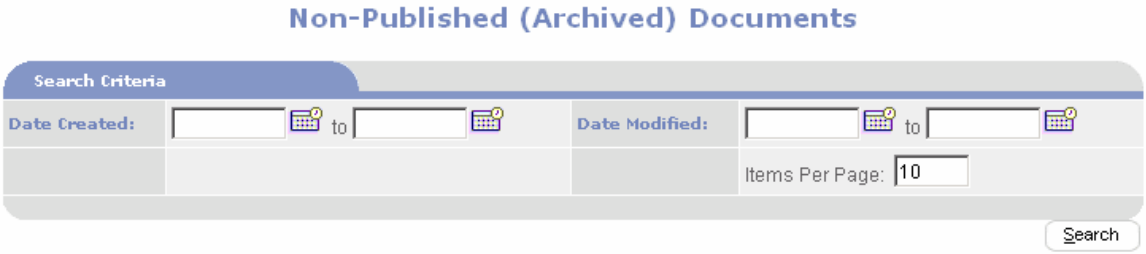
- **Default Auto Indexing To Field -** When individual documents are created and saved to the website, the value of the Auto Indexing field will be initially set to the value selected here.

  Archived Documents - While creating, modifying and collaborating on new documents, it is sometimes desirable to have copies of each evolving document available on the website to your team but not to the public. PortalProdigy's Version Control feature provides components to accomplish such a possibility. Using the Add New Version Button on the Document Management page, users can load several versions or a document without publishing to the visitor's Resource Document Library. Later, administrators or other permitted users on the team can review the *Archived* documents from the Document Version Management page by clicking on the View Versions button on the Document Management page.



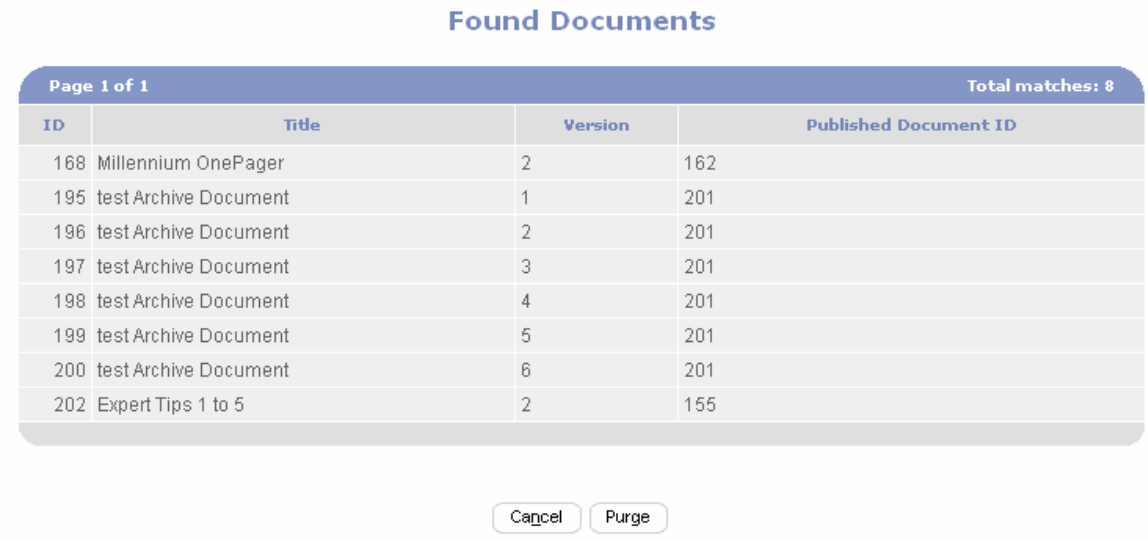
- **Prompt for Auto Archive? Field –** You may select *No* to avoid an annoying prompt when you are loading large numbers of documents. It is suggested that it always be set to *Yes*.

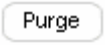
- **Purge Non-Published (Archived) Documents Link –** Clicking on this link accesses the Purge Non-Published (Archived) Documents search page which is used to locate archived documents and the purge them.



- **Created Date Range Search Field –**Entering a date in the first text box only, will retrieve all Documents with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.

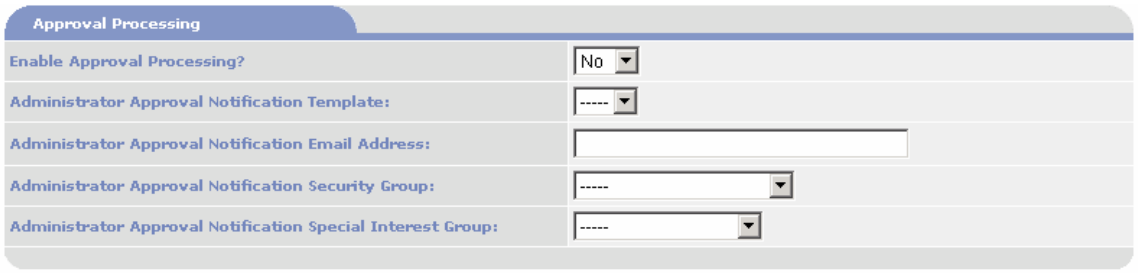
- **Modified Date Range Search Field –** used to search by date last modified range. Works the same as Created Date Range.



Clicking on the Purge Button  will delete all documents in this list from the Document Library. They will be deleted PERMANENTLY and shall not be recoverable.

- **Purge Expired Documents Link –**

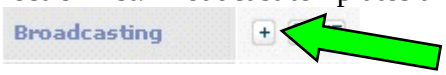
Approval Processing -



- **Enable Approval Processing Field** - This field can be set to Yes or No. If selected to Yes, the Approval Status of the document is set to Pending as displayed in the Approval Status field

on the Document Management page of the affected document until approved or declined by an authorized user.

- **Administrator Approval Notification Template Field** – If the Approval Processing Field is set to *Yes* and a notification letter is selected in this field, then notices will be automatically broadcast to individuals based on the settings in the Approval Notification Email Address, Administrator Approval Notification Security Group and Administrator Approval Notification Special Interest Group Fields.

  At least one broadcast template for the Object Type = Document must be created or nothing will show up in the selection list. Broadcast templates are created by clicking on the Broadcasting Add Button 

located in the Contact Management menu column of the Administration Menu (Ctrl-Alt-m).

- **Administrator Approval Notification Email Address Field** – Enter an email address here if you want approval notifications to be sent to a specific email address.

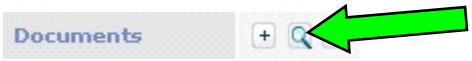
- **Administrator Approval Notification Security Group Field** – Select a security group from the list here if you want approval notifications to be sent to members of a specific security group.

- **Administrator Approval Notification Special Interest Group Field** - Select a special interests group from the list here if you want approval notifications to be sent to members of a specific special interests group.

Options:

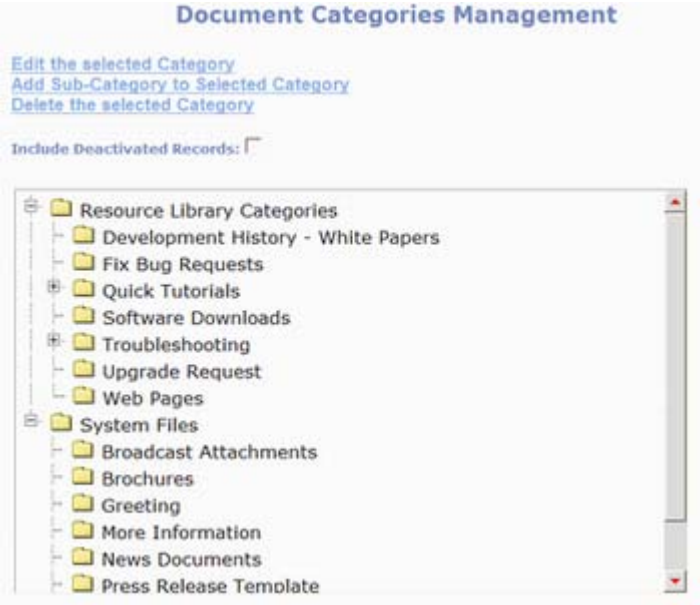
Topics	Used to create Topic headings for organizing Resources Documents.
Save	Saves the settings.
Print	Print the current page (contents of your browser window) according to your browser's print settings.
Cancel	Close the page discarding all entries and edits.
Close	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

1.3.2 Document Categories Management page:

Used to Add, Edit and Delete Document Categories. The Document Categories Management page is reached by clicking on the Documents Browse Button 

located in the Content Management menu column of the Main Administration Menu (Ctrl-Atl-m) and then clicking on **the Categories Manage** link of the Search for Documents page.

Categories are displayed as a hierarchal tree structure.



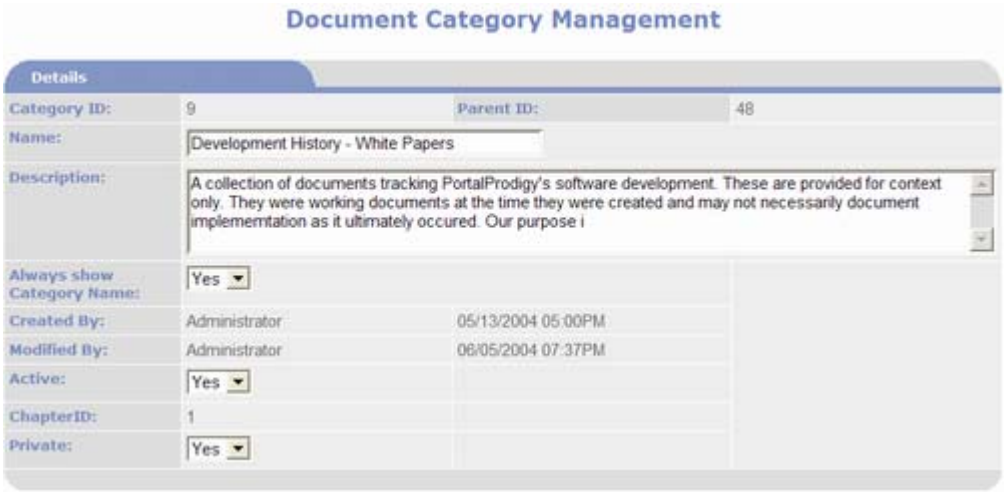
- Edit the selected Category – click to display Document Category Management page to edit the selected (highlighted) category.
- Add Sub-Category to Selected Category – click to display Document Category Management page to add new category as sub-category of selected (highlighted) category.
- Delete the selected Category – click to remove the selected (highlighted) category.
- Include Deactivated Records checkbox – check to display categories that have been deactivated (Active = *No*).

Option Buttons:

Close	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).
Print	Print the current page (contents of your browser window) according to your browser's print settings.
Main Menu	Close the page and go to Site Administration Main Menu.

1.3.3 Document Category Management page:

Used to define a category.



- **Category ID** – the unique record ID assigned by Portal Prodigy to the Category. This is only displayed in edit mode, after the new category record has been saved for the first time.

- **Parent ID** – the unique record ID assigned by Portal Prodigy to the Category's Parent Category. This is only displayed in edit mode, after the new category record has been saved for the first time.

- **Name** – this is the Category's name. Category names are listed on the Browse Resources by Category page. The Category names are listed in the Document Management page as checkboxes. A single document can be placed in multiple categories.

- **Description** – enter textual description of the Category. The Description is displayed after the Category Name on the Browse Resources by Category page. It allows you to provide an explanation of the categories content and usage.

- **Always Show Category Name** – this setting only applies when the Category is set to Private. It is used to allow all non-authorized users to see the Category Name, but not allow them access to the category's contents. Unauthorized users will receive a message notifying them that need special permission to access the categories contents. Set to *Yes*, to display the Category Name to all users. Set to *No* to hide the Category name from unauthorized users.

- **Created By** – the name of the user that created the record and the date it was created. Lists user's first name followed by last name.

- **Modified By** – the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.

- **Active** – by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.

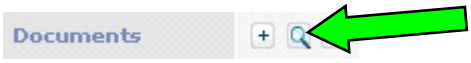
- **ChapterID** – This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.

- **Private** – by default this value is set to "No", which means the record is publicly available to all visitors of your site. To limit access to authorized users only, set to "Yes" then check each Security Group to be granted access. Security Groups are only listed when Private is set to "Yes".

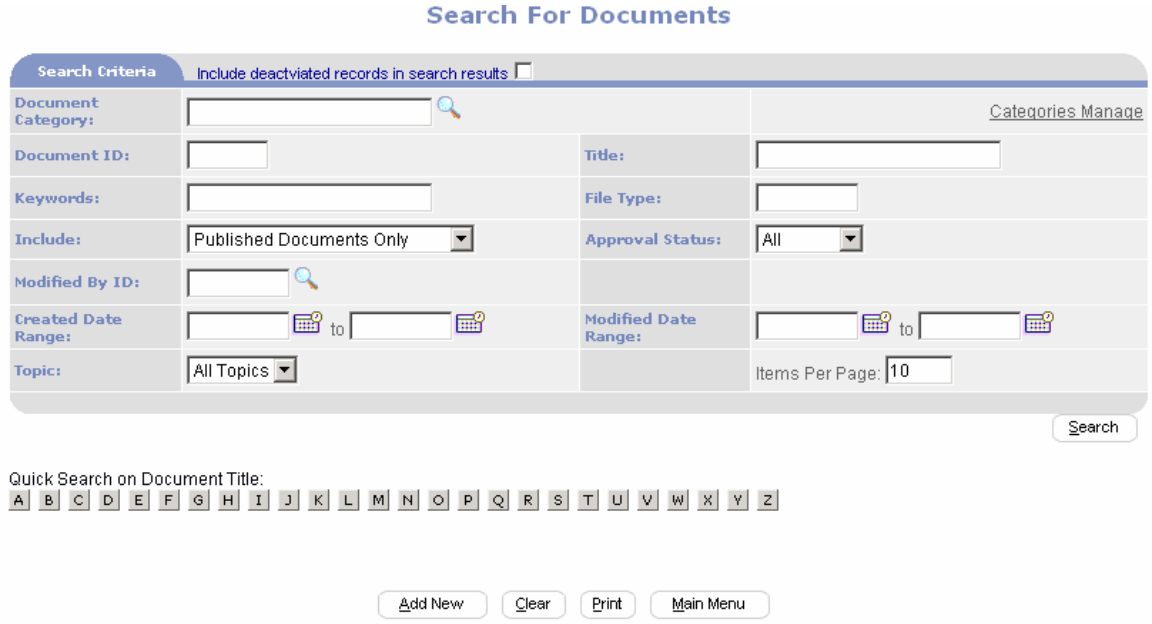
Option Buttons:

Save	Saves the Category record.
Print	Print the current page (contents of your browser window) according to your browser's print settings.
Delete	Removes the Category from the Resource Document Library.
Cancel	Close the page discarding all entries and edits.
Close	Close the page and save changes. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

1.3.4 Search For Documents page:

The Search for Documents page is reached by clicking on the Documents Browse Button 

located in the Content Management menu column of the Main Administration Menu (Ctrl-Atl-m).



- **Include deactivated records in search results:** when unchecked, only active records are included. Check to include reactivated records.

- **Document Category** - used to search for documents by categories. The option is used to lookup categories using the Document Categories Selection page.

- Categories Manage – link to Categories Management to add, edit and delete Document Categories.

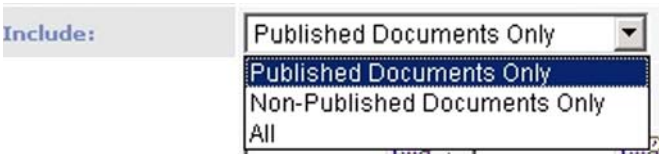
- **Document ID** – used to search for documents by their Document ID.

- **Title** – used to search for documents by title.

- **Keywords** – used to search on document keywords. These are the keywords entered in the Document Management page.

  File Type - used to filter documents by file extensions such as .txt, .doc, .doc, .jpeg, .mpeg, .html, etc.

- **Include** - used to search for pending or archived versions of documents, published versions or all documents.



- **Approval Status** – used to filter documents based on their Approval Status.

- **Modified By ID** – Click on the Lookup Icon to search for a specific contact record and filter for documents modified by that user.

- **Created Date Range –** when a new Document is added, PORTALPRODIGY stores the date maintained by the PORTALPRODIGY web-server system clock with the Document record. Entering a date in the first text box only, will retrieve all Documents with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.

- **Modified Date Range –** used to search by date last modified range. Works the same as Created Date Range.

- **Topics** – used to search for documents by document topic. Defaults to *All Topics*.

- **Items Per Page** – used to control how many documents are listed at a time in the matching documents. Defaults to **10**. If the number of matching documents is greater than the specified Items Per Page, navigation options are displayed to scroll through them. This feature minimizes network traffic.

- **Quick Search on Document Title** – click on a letter to list all documents that have a Document Title beginning with that letter.

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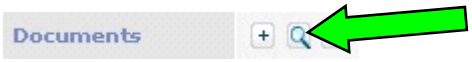
1.3.5 Document Management page:

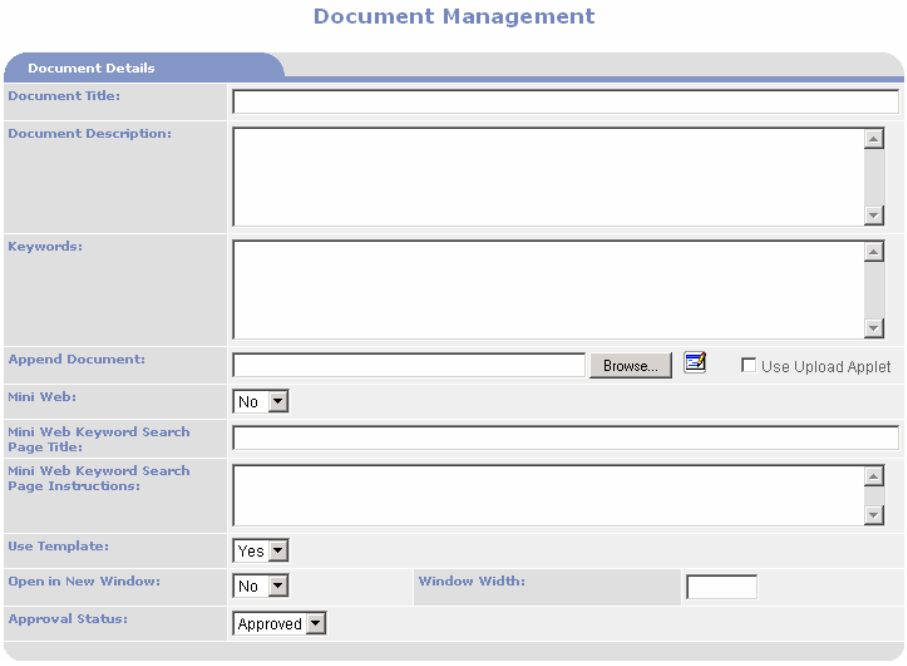
The Document Management page is reached by clicking on the Documents Browse Button



located in the Content Management menu column of the Main Administration Menu (Ctrl-Atl-m) and then searching for a document or clicking the Add New Button.

Used to add, edit, and remove documents from the Resource Document Library.

General section:

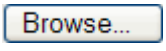


- **Document ID –** this is assigned automatically by PORTALPRODIGY when you save the document record. It can be used in other feature components to retrieve the document.

- **Document Title –** enter a name for the document. This name may be different than the physical file name.

- **Document Description –** you may enter a brief summary of the document here and applicable usage instructions. This description will be displayed following the Document name in all document listings pages.

- **Keywords –** this is used to enter keywords and phrases for indexing and performing document searches. Enter one keyword or phrase per line. Press enter to go to next line. You may enter an unlimited number of keys.

- **Append Document** - when creating a new record, an empty text box is displayed. You may enter the path and file name into the text box, e.g. "c:\my documents\PortalProdigy.htm", or you may use the 

button to locate and select a document (file) that is stored on the user's work station.

- **Mini Web** – the default is *No*. Mini Web's are created using Web Help Builder, a software tool for converting Microsoft Word documents into mini Websites complete with Table of Contents, Index, Navigation Options, and Keyword Search capability. Web Help Builder is a product of Brolin Corporation. Contact your Portal Prodigy representative or IBCA for more information about Web Help Builder. Set Mini Web to *Yes*, when loading a Mini Web into your Resource Document Library.

- **Mini Web Keyword Search Page Title** – used to define the title displayed on the Mini Web's Keyword Search page. Only applicable when Mini Web is set to *Yes*.

- **Mini Web Keyword Search Page Instructions** – used to define search instructions displayed on the Mini Web's Keyword Search page. Only applicable when Mini Web is set to *Yes*.

- **Use Template –** the default value is *Yes*, which instructs PORTALPRODIGY when possible to display the document (file) within your website's template pages. Set this to "No" if you want to the document (file) to be displayed in a separate window without your website's template. Common document (file) formats such as ".htm", ".txt" and ".pdf" can be displayed within your website's template. Documents (Files) requiring third party software to host (open) the document, may not operate within your website's template. If the user's computer is not setup to auto-run the third party software required by the document (file), PORTALPRODIGY will prompt will allow the user to download the file to their computer.

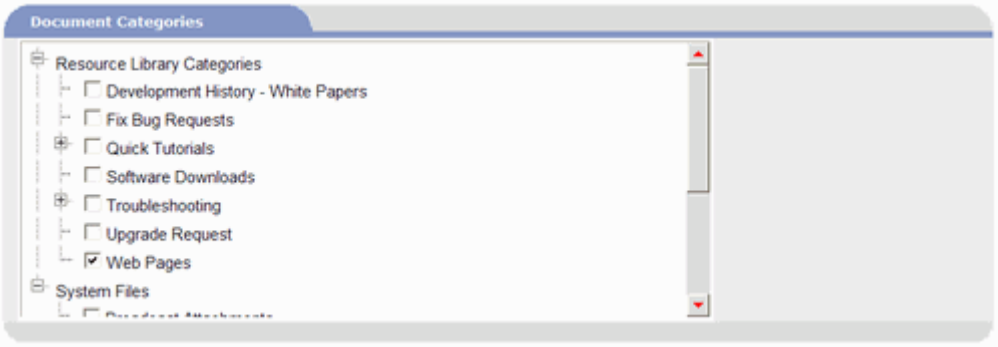
- **Open in New Window –** Sometimes it is desirable to have a document open in a browser window other than the one that is active, such as what are commonly called pop-ups. If you want a document to open in a different window when visitors to your site select it, then select *Yes* for this field.

- **Window Width** – If you select Yes for Open in New Window, indicate the pixel width of the new window (typically between 600 and 800).

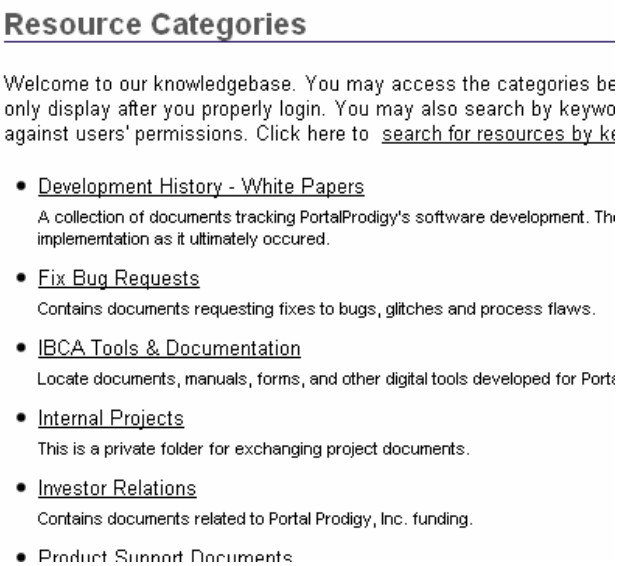
- **Approval Status** – When using version control, this field indicates whether a document is approved to be displayed on the visitor's portion of the website.

When editing an existing record, the **Append Document** option is no longer visible.

Document Categories section:



- **Categories** – Controls location in the public portion of the website Browse Document Library pages. Check each Category that the document is to be listed under.



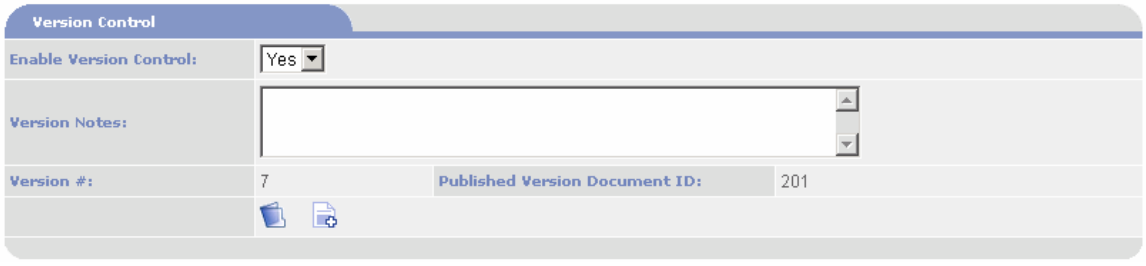
- **Resource Library Categories –** all Categories defined using Categories Management are listed here. These are the Categories that are listed in the Resource Document Library Browse Resources by Category pages and as search criteria on the Search Resources by Keyword page.

- **System Files** – these are special categories created and used by the Portal Prodigy system. When a Brochure is added to a Product, Portal Prodigy automatically creates a Document record and places the document into the Resource Document Library and assigns it to the System Files > Brochures Category. You may also add documents to these categories via Document Management.

- - the plus sign is displayed when a Category contains Sub-Categories. Click on the plus sign to expand the category to view its sub-categories.

Version Control Section:

By enabling Version Control on the website, users are provided the ability to: designate published version of a document; undo changes by reverting to previous version; collaborate and approve changes prior to posting; archive and view history of document changes; approve and decline documents or versions; notify administrator of document pending approval and command selected documents to open in a new window.



- **Enable Version Control Field -** This field can be set to *Yes* or *No*. When set to Yes, multiple versions of a single document may be saved.

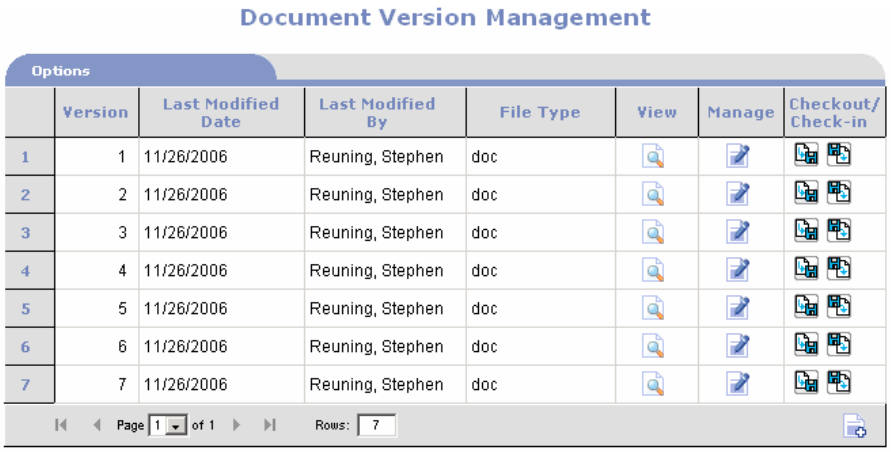
- **Version Notes -** This free form memo field is used to communicate with others who may be collaborating on the master document.

- **Version Number -** If version control is enabled and several versions of a document are archived then the sequential number based on the order entered is displayed here.

- **Published Version Document ID -** Indicates the Document ID of the *published* (active/displayed on public portion of site) version of the document.

- **View Versions Icon** - While creating, modifying and collaborating on new documents, it is sometimes desirable to have copies of each evolving document available on the website to your team but not to the public. PortalProdigy's Version Control feature provides components to accomplish such a possibility. Using the Add New Version Button on the Document Management page, users can load several versions or a document without publishing to the visitor's Resource Document Library. Later, administrators or other permitted users on the team can review the *Archived* documents from the Document Version Management page by clicking on the View Versions button on the Document Management page.

Document Version Management Page

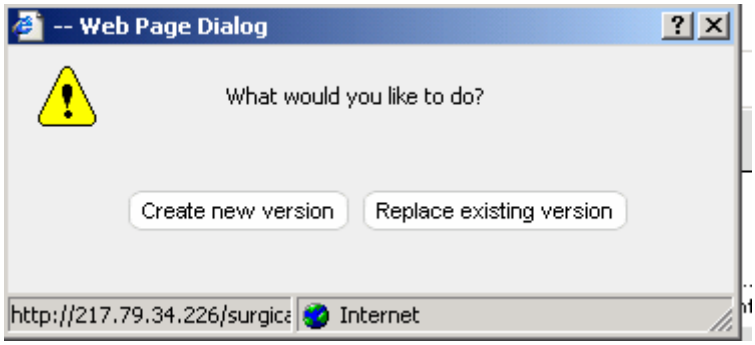


View Icon – opens the corresponding version of the document in a browser window.

Manage Icon – opens the Document Management page for the corresponding document in a browser window.

Check Out Icon – Click on this button to checkout the document (file). You will be prompted to open or save the file. When you checkout a document (file), PORTALPRODIGY sets the records status to checked out and stores your User Name and the Date as the person that last checked it out. It will clear this when you check the document (file) back in. Note that it only records the most recent person who checked out the document. Thus if someone checks it out before you check it back in, it will replace the checked out by with the new persons User Name and Date.

Check-In Icon - Click on this button to update the document (file). It displays the Document Check In page, allowing you to save (upload) an updated version of the document (file). See previous explanation of Append Document field.



Documents Mini Browser Options section:

- **Include Link On Home Page –** defaults to "No", which means the document (file) will not be displayed in the Home Page Resource Mini Browser. Set to "Yes" to display the

document in the Home Page Resource Mini Browser. Note that this feature must be enabled in Greeting Features Management.

- **Home Page Sort Order –** (only applicable when **Include Link On Home Page** is set to "Yes") defaults to "0", which means PORTALPRODIGY will list the Document alphanumerically amongst all documents with sort value of "0". PORTALPRODIGY sorts on Document Title. To control the sort order, enter a number (integer) value. PORTALPRODIGY lists documents sequentially based on Sort Order starting with 0. Documents with duplicate Sort Order values are sorted alphanumerically within the Sort Order sequence.
- **Use –** (only applicable when **Include Link On Home Page** is set to "Yes") defaults to "Bullet", which will cause the Home Page Mini Browser to list the documents with bullets. To display with a thumbnail image, set to "image". This will enable the **Upload Image** Browse... button.
- **Upload Mini Browser Image–** (only applicable when **Include Link On Home Page** is set to "Yes" and **Use** is set to "Image".)enables you to attach an image to be displayed in the Home Page Resource Mini Browser. Select Browse... button to load image.

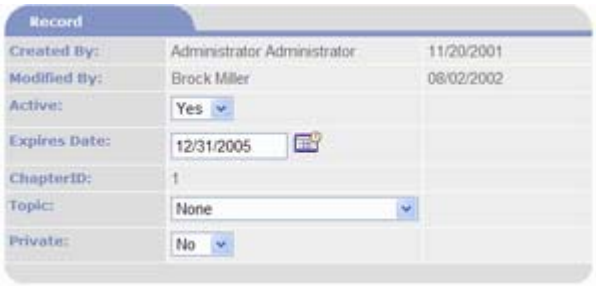
Document section:

The Document section is not visible when creating a new record. It is only displayed after the record has been saved and you are in edit mode.

- **Original File Name –** when creating a new record, an empty text box is displayed. You may enter the path and file name, e.g. "c:\my documents\PortalProdigy.htm" or you may use the ,
  - Click on this button view the document.
  - Click on this button to edit HTML and Text documents (files). This button only displays when the file type is either ".htm" or ".txt".
  - Click on this button to update the document (file). It displays the Document Check In page, allowing you to save (upload) an updated version of the document (file). See previous explanation of Append Document field.
  - Click on this button to checkout the document (file). You will be prompted to open or save the file. When you checkout a document (file), PORTALPRODIGY sets the records status to checked out and stores your User Name and the Date as the person that last checked it out. It will clear this when you check the document (file)

back in. Note that it only records the most recent person who checked out the document. Thus if someone checks it out before you check it back in, it will replace the checked out by with the new persons User Name and Date.

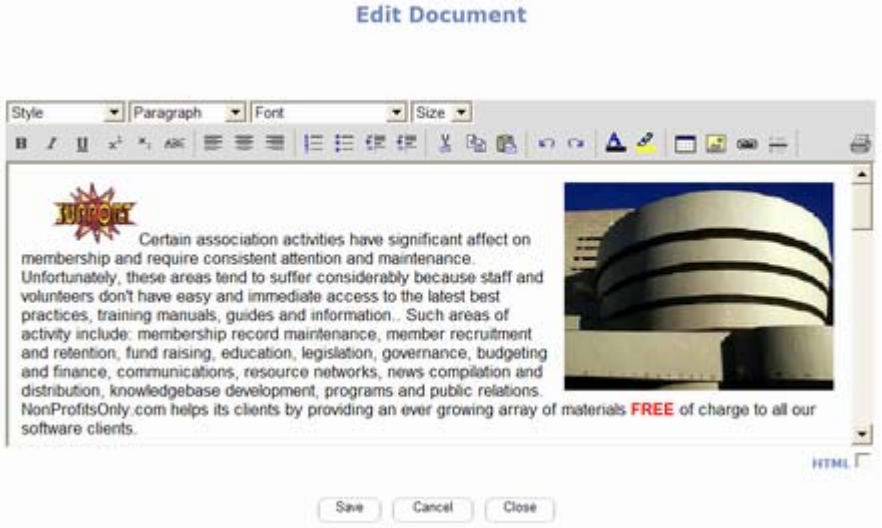
The available Categories are listed down the right hand side of the page. Check the Categories that you want to the document (file) to be assigned to. Categories are defined in Resource Category Management.



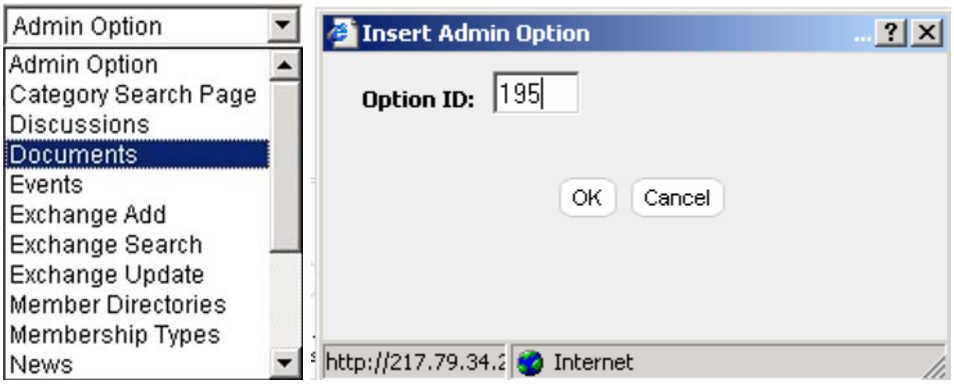
- **Created By** – the name of the user that created the record and the date it was created. Lists user's first name followed by last name.
- **Modified By** – the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.
- **Active** – by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.
- **Expires Date -** by default this is empty. When a date is entered, the document will no longer be available in the Public Interface after the expiration date. The document shall still be accessible using Document Management.
- **ChapterID** – This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.
- **Topic** – by default this value is set to "None", meaning the document (file) is not assigned to a Topic. To assign the document (file) to a Topic, select one using the list box. Topics are used to breakdown the display of documents (files) within Categories. Topics are defined in Document Features Management.
- **Private** – by default this value is set to "No", which means the record is publicly available to all visitors of your site. To limit access to authorized users only, set to "Yes" then check each Security Group to be granted access. Security Groups are only listed when Private is set to "Yes".

1.3.6 Document Editor:

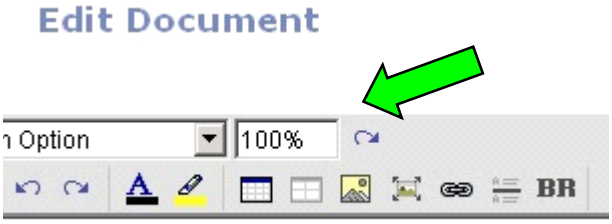
Used to created and edit HTML documents. Click on the HTML Editor Icon on the Document Management page to use the Document Editor.



- **Style:** do not use this option.
- **Paragraph** - used to select a preformatted font, size and other formatting characteristics. Applies to either the paragraph where the cursor is positioned or to all paragraphs that are highlighted by the cursor.
- **Font:** used to select a font for the highlighted block of text or new text inserted at the current cursor position.
- **Size** - used to select a font size for the highlighted block of text or new text inserted at the current cursor position. Select from the standard HTML values of 1-6.
- **Admin Option –** This selection list provides a shortcut hyperlink insertion method to specific records in the website. Need a link to document 195? Select Admin Option = Document and then type 195 into the Insert Admin Option dialog window and click the OK Button OK.



- **Window Width –** enter pixel value (400px) to specify maximum width in pixels or percentage (75%) to indicate maximum width as percentage of window.



Click Refresh Icon to refresh screen.

- **Bold -** used to bold either the highlighted block of text or new text inserted at the current cursor position.
- **Italic:** used to italicize either the highlighted block of text or new text inserted at the current cursor position.
- **Underline:** used to underline either the highlighted block of text or new text inserted at the current cursor position.
- **Superscript:** used to superscript either the highlighted block of text or new text inserted at the current cursor position.
- **Subscript:** used to subscript either the highlighted block of text or new text inserted at the current cursor position.
- **Strikethrough -** used to place a strikethrough either the highlighted block of text or new text inserted at the current cursor position.
- **Left Justify:** used to left justify (align to left side of page) each paragraph within a highlighted block of text or the paragraph where cursor is positioned.
- **Center Justify:** used to center justify (align to middle of page) each paragraph within a highlighted block of text or the paragraph where cursor is positioned.
- **Right Justify -** used to right justify (align to right side of page) each paragraph within a highlighted block of text or the paragraph where cursor is positioned.
- **Numbered List:** used to sequentially number each paragraph within a highlighted block of text or the paragraph where the cursor is positioned.
- **Bullet List:** used to bullet list each paragraph within a highlighted block of text or the paragraph where the cursor is positioned.
- **Increase Indent** - used to increase the margin indentation of each paragraph within a highlighted block of text or the paragraph where the cursor is positioned.
- **Decrease Indent:** used to decrease the margin indentation of each paragraph within a highlighted block of text or the paragraph where the cursor is positioned.
- **Cut:** used to cut the highlighted block of text and place on the clipboard.

- **Copy:** used to copy the highlighted block of text and place on the clipboard.
- **Paste:** used to past the current contents of the clipboard into the document where the cursor is positioned.
- **Undo Typing:** used to undo the last action taken or to undo the last contiguous insertion or deletion of text.
- **Redo Typing -** used to redo the last action that was undone or to redo the last contiguous insertion or deletion of text that was undone.
- **Font Color -** used to change the font color of either the highlighted block of text or change the font color for new text inserted at the current cursor position.
- **Background Color:** used to change the background color of either the highlighted block of text or change the background color for new text inserted at the current cursor position.
- **Insert Table:** used to insert a table at the current cursor position
- **Insert Image:** used to upload and insert an image at the current cursor position
- **Insert Link:** used to insert a link to a URL at the current cursor position
- **Insert Rule:** used to insert a ruler line at the current cursor position
- **Print:** used to print the document.
- **HTML -** check to view HTML code. When unchecked the user sees the document as it will be displayed (WYSIWYG).
- **Option Buttons:**
- Save used to save the document and close the page. It automatically saves and closes the page without prompting.
- Cancel used to close the document discarding all entries and edits.
- Close used to close the document and save changes. PORTALPRODIGY prompts the user, asking if they want to save the changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

1.4 Feature Administration

Before you begin building your knowledgebase give some thought to how you want to organize your documents. You can organize your documents by Categories and within Categories by Topics. You use Resource Category Management to add, edit and delete Categories. An individual Document can be assigned to one or more Categories. Document Topics are maintained in Documents Feature

Management. An individual document can be assigned to a single topic, which will be listed in each Category that the document is assigned to.

You may also enter keywords for each document that are indexed and searchable within the Visitor user interface. Keywords are entered using Document Management, which is available in the Administration User Interface or using the Add Document feature, which can be made available to permitted users in the Visitor User Interface.

Document Management is where you add, edit and delete Documents. Using Document Management you can assign a document to one or more Categories, specify the document to be included in the Resource Mini Browser on your home page, enter a summary description and instructions to be displayed in the Document Listings, define how the document is to be displayed (within your site's template or in separate window), and assign access rights to the document.

You can also use Document Management to enter an expiration date for a document. Upon expiration, the document is no longer available in the Visitor User Interface, yet the document remains in the repository and available in the Administrative User Interface.

Various feature components within PORTALPRODIGY provide the ability to attach special documents such as Brochures, Credit Terms, and Order Terms and Conditions, etc. PORTALPRODIGY stores these documents in the Document Resource Library. By default, they are placed in Categories (Sub-Categories of System Files Category) that are set to private and accessible only by Administrators. This can be changed to make them accessible to other Security Groups or accessible in the public interface.

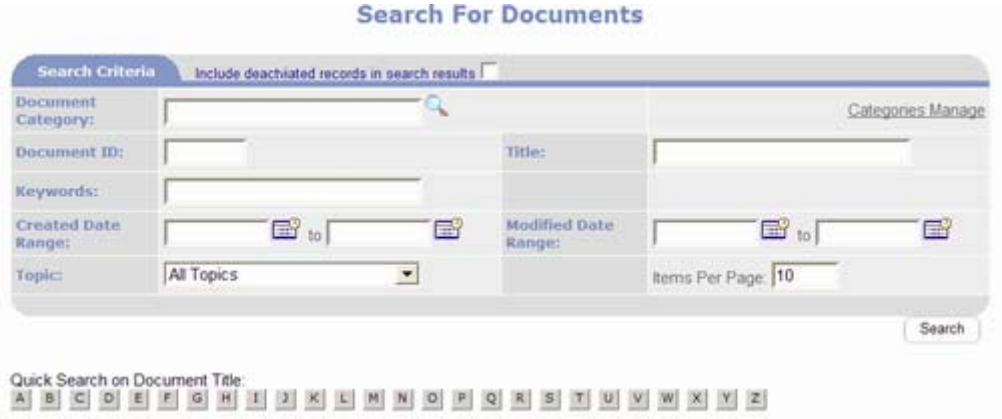
The first time you upload a document to Portal Prodigy, you will be prompted to install the Software Artisan's File Upload applet. This is a Java applet that enables you to load files to the Portal Prodigy Resource Document Library. When prompted confirm that it is Ok to install this component.

1.5 Tutorials

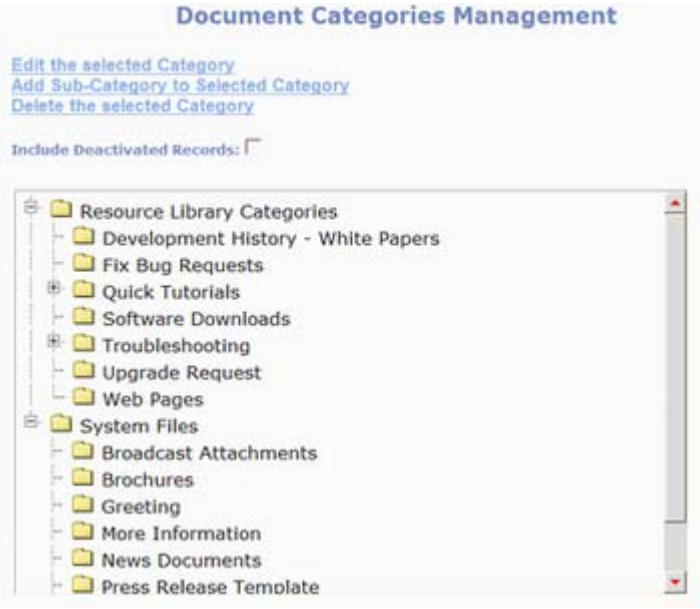
1.5.1 Add a New Document Category:

Go to the Site Administration menu.

Click the Document icon to display the Search For Documents page.



Click on the Categories Manage link to go to the Document Categories Management page.



Click on *Resource Library Categories* to highlight it.

Click on the Add Sub-Category to Selected Category link at the top of the Document Categories Management page.

Enter a Name for the Category. You may also enter a description of the Category, but this is not required.

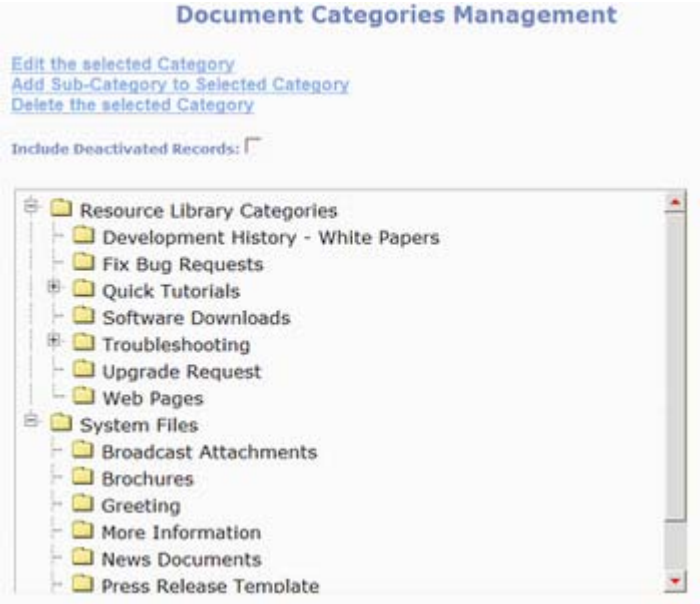
Click on Close and confirm save when prompted.

1.5.2 Edit a Document Category:

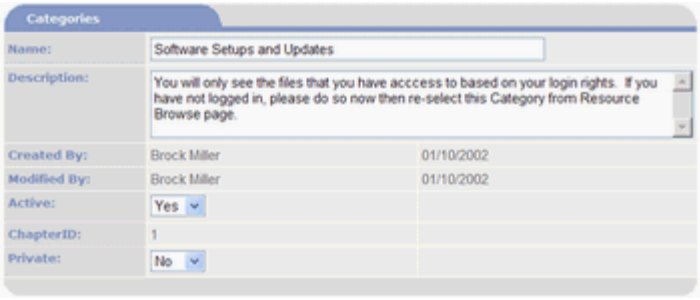
Go to the Site Administration menu

Click the Document icon to display the Search For Documents page.

Click on the Categories Manage link to go to the Document Categories Management page shown below.



Click on the name of the Category you want to edit then click Edit the Selected Category. This will display the Document Category Management page shown below.



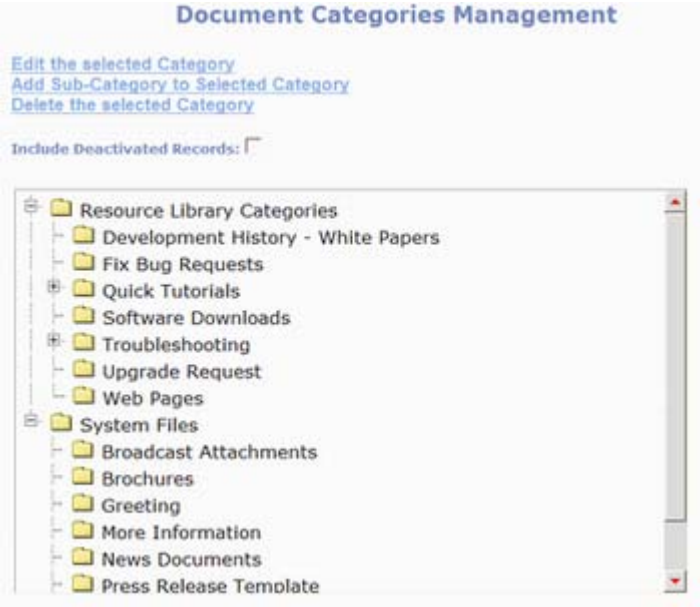
Edit the category and when finished click on Close and confirm save when prompted.

1.5.3 Delete a Document Category

Go to the Site Administration menu

Click the Document icon to display the Search For Documents page.

Click on the Categories Manage link to go to the Document Categories Management page shown below.

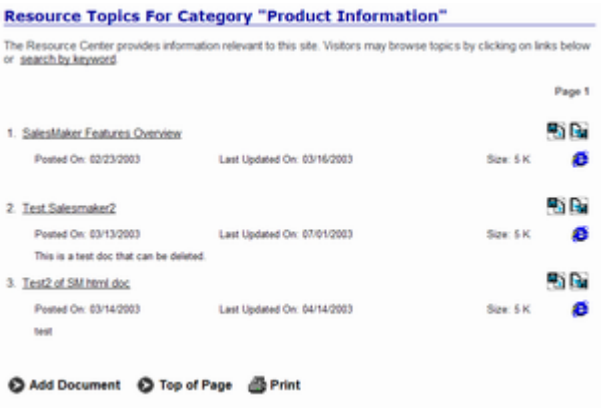


Click on the name of the Category to delete then click Delete the Selected Category. When prompted, click Ok to confirm deletion of the Category.

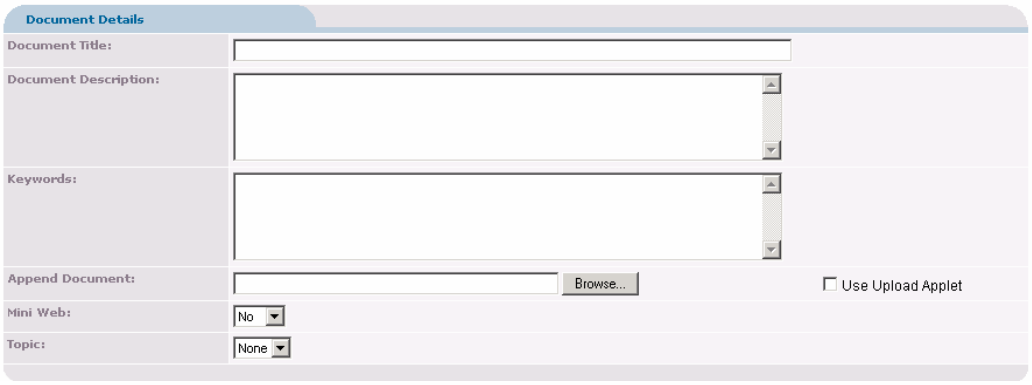
1.5.4 Add a New Document from Visitor Portion of the Site:

To access this feature, you must be logged in and belong to a Security Group that has Edit rights assigned to the ResourceDocLibrary-Add&Update (Public) security feature component.

- **Select a Category:** From Browse Resource Topics Categories page select the Category you want to add the document to by clicking on the Category name.



- **Add Document:** Located at the bottom of the page is the Add Document option. Click on this to display the New Resource page.



- **Browse:** Click on the Browse... button to locate and select the appropriate document (file) that is stored on your system.

The first time you upload a document from a computer using PORTALPRODIGY, you may be prompted to install an Active-X component from Software Artisan's. PORTALPRODIGY uses this component to efficiently and reliably load documents via the HTML protocol. If this sounds entirely too technical, just answer Yes and leave it at that. You will not prompted to do this again, unless you change your computer configuration.

- **Upload Prompt:** Click Ok to confirm upload:

- **Transfer Status window -** This window provides a status of the file transfer. It will close automatically when the transfer has been completed and the following Success message will be displayed.

- **Confirmation Message:** at this point the document has been successfully uploaded. You may click Ok to return to the previous page or select any link from the available menu options.

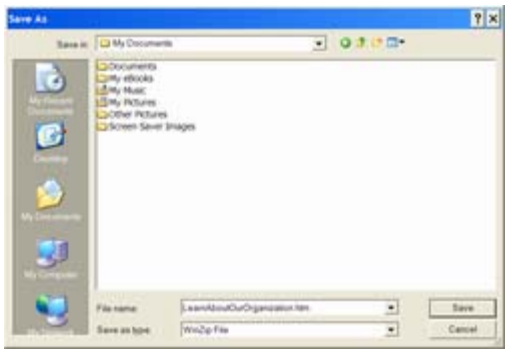
1.5.5 Checkout a Document from the Visitor Portion of the Site for Editing:

To access this feature, you must be logged in and belong to a Security Group that has Edit rights assigned to the ResourceDocLibrary-Add&Update (Public) security feature component.

If the visitor has the required access rights they may Check-out a document from the Visitor User Interface.

- **Locate the Document:** The first step is to locate the document. This may accomplished by using either the Browse Resource Topics by Categories or the Search by Keyword option. Both of these methods produce a listing of documents.
- **Select Check-out:** To the right of the document name click on the Check-out a document icon. Your computer system will display a File Download dialog box similar to the one below. Note that the actual dialog box is dependent on your operating system. Select Save.

- **Save As:** Your computer system will display a dialog box for you to select a folder to save the file to.



HTML Documents that contain images, scripts or style sheets are downloaded as a single compressed zip file that contains the .htm page and all the related files. These files require an unzipping tool such as WinZip to open them.

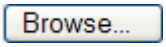
When the download is completed the following dialog box is displayed.

1.5.6 Update Document from the Visitor Portion of the Site:

To access this feature, you must be logged in and belong to a Security Group that has Edit rights assigned to the ResourceDocLibrary-Add&Update (Public) security feature component.

When the Visitor has the required access rights they may use the Check-in a document from the Visitor User Interface to load a file from their computer.

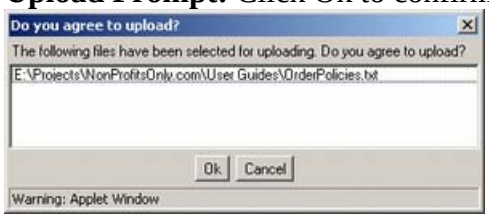
- **Locate the Document:** The first step is to locate the document. This may accomplished by using either the Browse Resource Topics by Categories or the Search by Keyword option. Both of these methods produce a listing of documents.
- **Select Check-in:** To the right of the document name click on the Check-in a document icon. This displays the Document Check In page.

- **Browse:** Click on the 

button to locate and select the appropriate document (file) that is stored on your system.

The first time you upload a document from a computer using PORTALPRODIGY, you will be prompted to install an Active-X component from Software Artisan's. PORTALPRODIGY uses this component to efficiently and reliably load documents via the HTML protocol. If this sounds entirely too technical, just answer Yes and leave it at that. You will not prompted to do this again, unless you change your computer configuration.

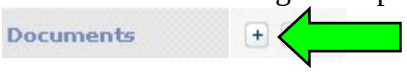
- **Upload Prompt:** Click Ok to confirm upload:



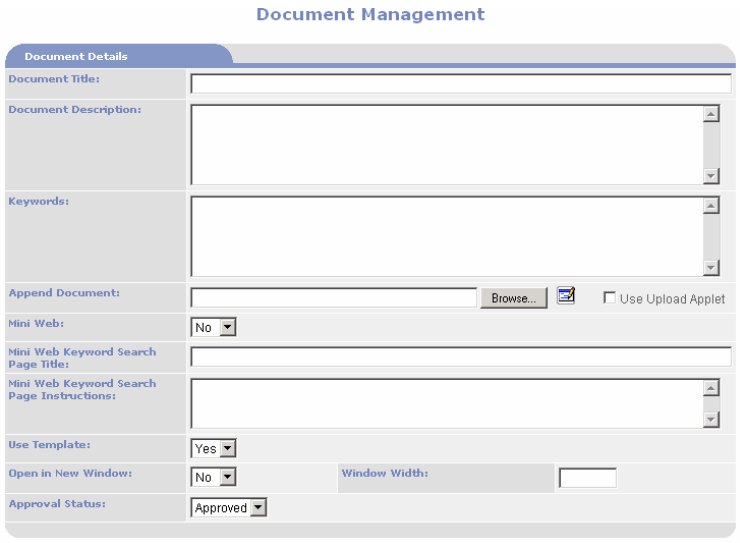
- **Transfer Status window** - This window provides a status of the file transfer. It will close automatically when the transfer has been completed and the following Success message will be displayed.

- **Confirmation Message:** at this point the document has been successfully checked-in. You may click Ok to return to the previous page or select any link from the available menu options.

1.5.7 Add Document from Administration Portion of the Site:

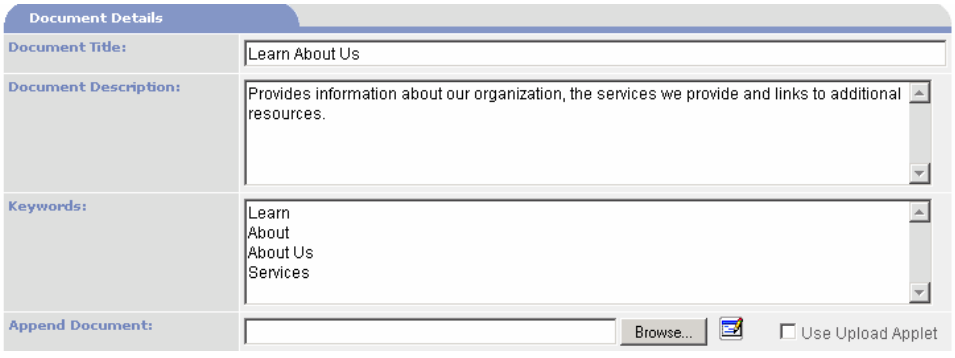
The Document Management page is reached by clicking on the Documents Add Button 

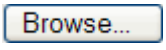
located in the Content Management menu column of the Main Administration Menu (Ctrl-Atl-m).
Note that you may also select the Add New option on the Search For Documents pages.



Enter a title for the document and an optional description.

Enter searchable keywords and phrases in the Keys input area. Keywords and Phrases are entered one per row. Use the Enter key as the end of the phrase or keyword to go to the next row. Your Keywords and Phrases should appear as follows:



Click on the 

button to locate and select the appropriate document (file) that is stored on your system.

The first time you upload a document from a computer using PORTALPRODIGY, you will be prompted to install an Active-X component from Software Artisan's. PORTALPRODIGY uses this component to efficiently and reliably load documents via the HTML protocol. If this sounds entirely too technical, just answer "Yes" and leave it at that. This is a one time install per computer. You will not be prompted to do this again unless you change your computer configuration.

- **Upload Prompt:** Click Ok to confirm upload. If you are uploading an HTML document, PORTALPRODIGY knows to also upload the HTML documents subfolder. The HTML subfolder is where images, scripts, style sheets and any other files required to support the HTML document are stored. The subfolder must follow the standard web page subfolder naming convention, which appends _files to the htm files name, e.g. the subfolder for *LearnAboutUs.htm* must be named *LearnAboutUs_files* .

The path and file name are then displayed in the Append Document text box.

If you want the document to open in a separate window without being bordered by you site template set Use Template to *No*; otherwise, leave as *Yes*.

Check each Category you want the document to belong to.

Click on the Close button.

In the pop-up dialog box, click Yes to upload and save the new document.

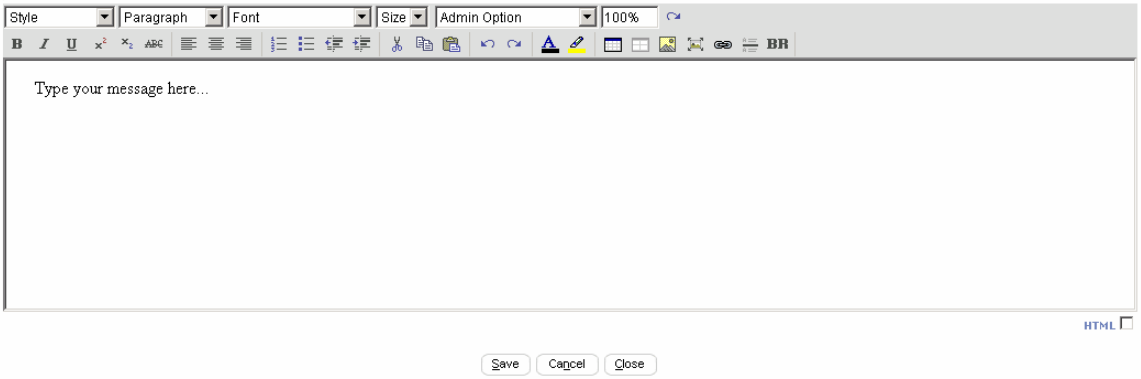
This starts the file transfer. A Transfer Status window is displayed to provide the status of the file transfer. It will close automatically when the transfer has been completed and the following Success message will be displayed.

- **Confirmation Message:** at this point the document has been successfully checked-in. You may click Ok to return to the previous page or select any link from the available menu options.

1.5.8 Using the Document Editor:

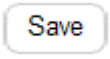
Create a New HTML Document:

Click on the button from any page that contains this option to display the Edit Document page shown below.



Type or cut and paste content into the editor.

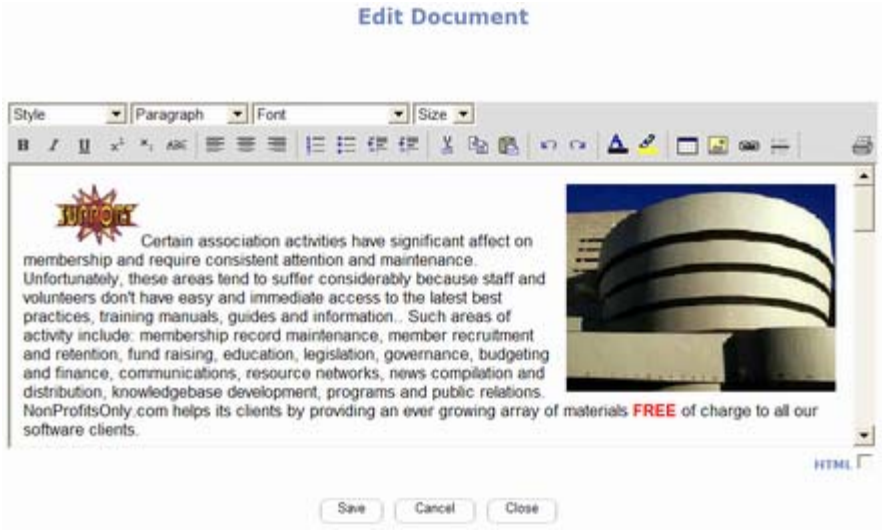
Use the formatting options displayed as icons on the Document Editor's toolbar to format your content.

When finished editing the document, click on 

button to save the document and close the Document Editor. Note that images are uploaded when you select save, therefore there may be a pause while PORTALPRODIGY is uploading the images in the background. The length of the pause is dependent on the number and file size of the images and speed of your network connection.

Edit an Existing HTML Document:

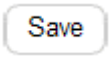
Click on the button from any page that contains this option to display the Edit Document page shown below.



Edit your documents content. You may type or cut and paste content into the editor.

To change the format of text or any section of the document, highlight the block to format and select one of the formatting options displayed as icons on the Document Editor's toolbar to format your content.

To edit objects such as Tables, Images, Links and Rulers, click on the object to highlight it then click on the applicable icon. When editing a table be sure to select the Edit Table tab in the dialog box; otherwise the Document Editor will insert a new table within the existing one.

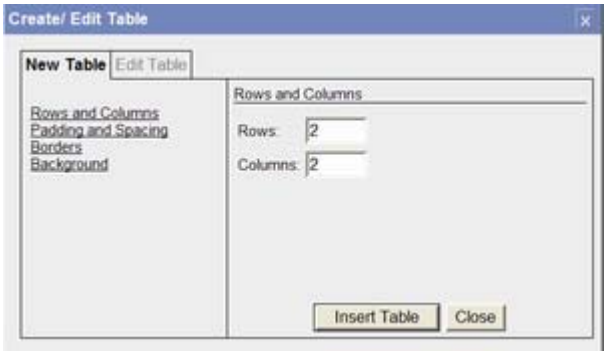
When finished editing the document, click on 

button to save the document and close the Document Editor. Note that images are uploaded when you select save, therefore there may be a pause while PORTALPRODIGY is uploading the images in the background. The length of the pause is dependent on the number and file size of the images and speed of your network connection.

Insert a Table:

Position the cursor in your document where you want to insert the table.

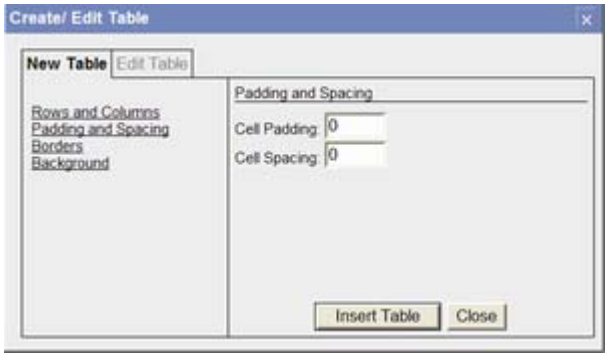
Click on the insert table icon to display the Create/Edit table dialog box as shown below -



Enter the number of rows for the table to have.

Enter the number of columns for the table to have.

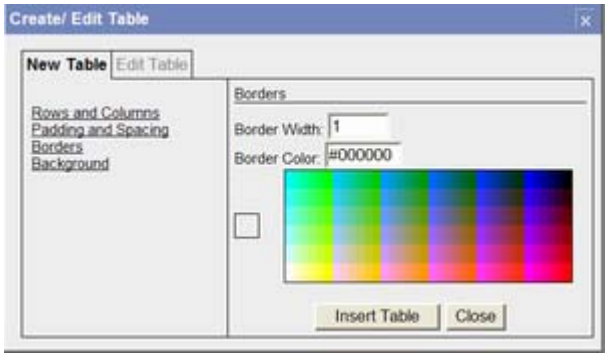
Click on Padding and Spacing.



Enter the cell padding, which is the margin separating a cell's content from the cell border. Enter *0* to eliminate spacing.

Enter the cell spacing, which is the margin separating each cell's border from the borders of other cells and the outer border of the table. A number of 1 or greater will cause double lined borders. Enter *0* to eliminate spacing and have single line borders.

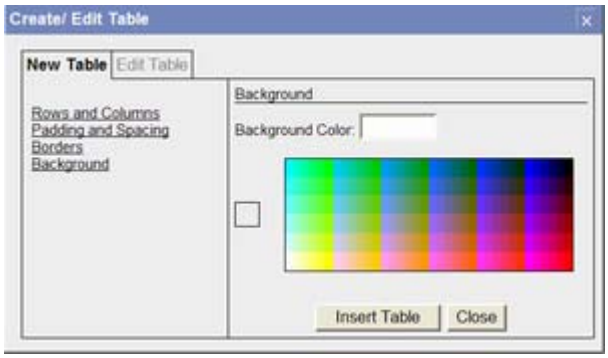
Click on Borders.



Enter a Border Width, which is the thickness of the lines.

Select a Border Color by clicking on a color in the color chart or enter a hexadecimal color code in Border Color.

Click on Background.



Select a Background Color by clicking on a color in the color chart or enter a hexadecimal color code in Background Color.

Click button.

The table will appear in the document similar to the example shown below:

Click in each cell and type your entries. The cells expand to accommodate the entry. The tables will automatically adjust to accommodate entries in other columns and will automatically perform a wrap the text within the cells. The Document Editor will not allow a table to exceed the width of the page supported by PORTALPRODIGY. The page width is designed to fit within the standard content dimensions of a PORTALPRODIGY Website page.

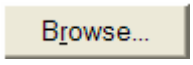
Note that you may insert a table within a cell and you may insert an image into within a cell. You may format the contents of a table using the same format options located on the toolbar that are used for content outside of a table.

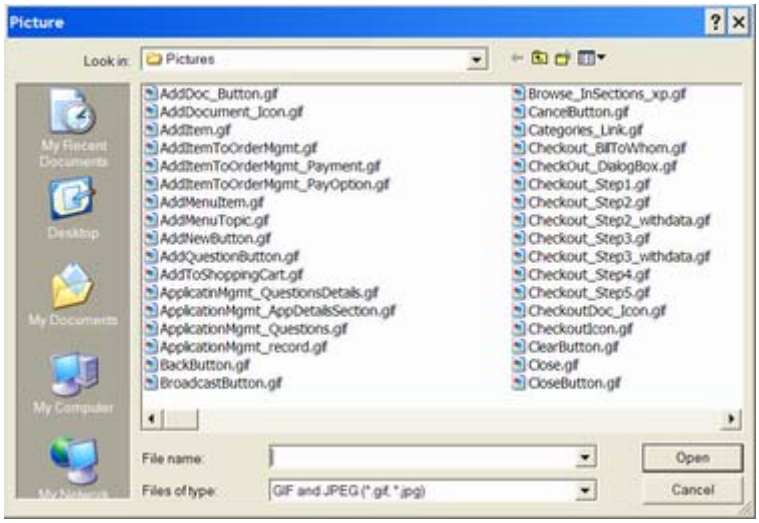
Name	City	Year
Elizabeth	San Bernardino	1964
Brenda	San Bernardino	1966
Mendy	San Bernardino	1970

Insert an Image:

Position the cursor in your document where you want to insert the image.

Click on the insert image icon to display the Picture dialog box as shown below:

Click on the  button to locate and select an image file to upload. This will display a dialog box similar to the one below (note the actual dialog box is dependent on your computer operating system and version):



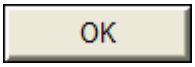
Highlight the image file to insert and click Open (or equivalent command).

You may enter into Alternate Text the label to be displayed as a placeholder for the image. Note that it is not necessary to enter an alternate text.

Set the images Alignment. This controls the placement of the image within the document relative to where you are inserting it. We suggest you experiment with the settings to see how they affect the positioning of the image. This setting can be used to place an image inline with text, above text, below text, etc.

You may enter a Border Thickness to have a border placed around the image. Leave this field blank or enter a *0* to display the image without a border.

You may enter Horizontal and Vertical Spacing values to create space between the horizontal and vertical borders of the image and the surrounding text or content. We suggest you experiment with the settings to see how they affect the positioning of the image. Leave this field blank to eliminate extra spacing around the image.

Click on  button to save the settings and insert the image within the document.

View/Edit HTML Mode (Advanced Feature):

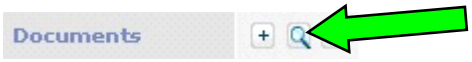
Use of the View/Edit HTML mode is an advanced feature and is not necessary for the creation of attractive documents.

To view the HTML code, click on the HTML checkbox located below the lower left corner of the editing window. The HTML is displayed as shown below:

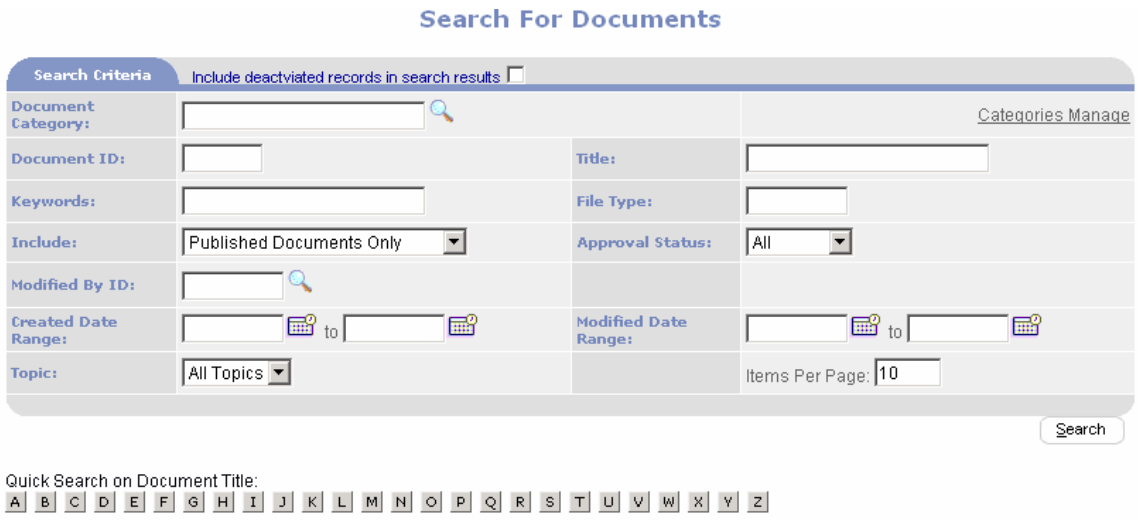
You may directly edit the HTML and insert new HTML tags and text while in the View/Edit HTML mode. Beware that the Document Editor will not correct HTML coding; therefore if you make a mistake your documents may not display correctly.

1.5.9 Search for Documents from Administration Portion of Site:

The Search for Documents page is reached by clicking on the Documents Browse Button



located in the Content Management menu column of the Main Administration Menu (Ctrl-Atl-m).



- **Using Quick Search on Document Title:** You may click on one of the letter buttons to view a list of all documents with a Title beginning with the specified letter.

- **Using Search Criteria -** you may enter search criteria into the criteria text boxes and select values from the drop down list.

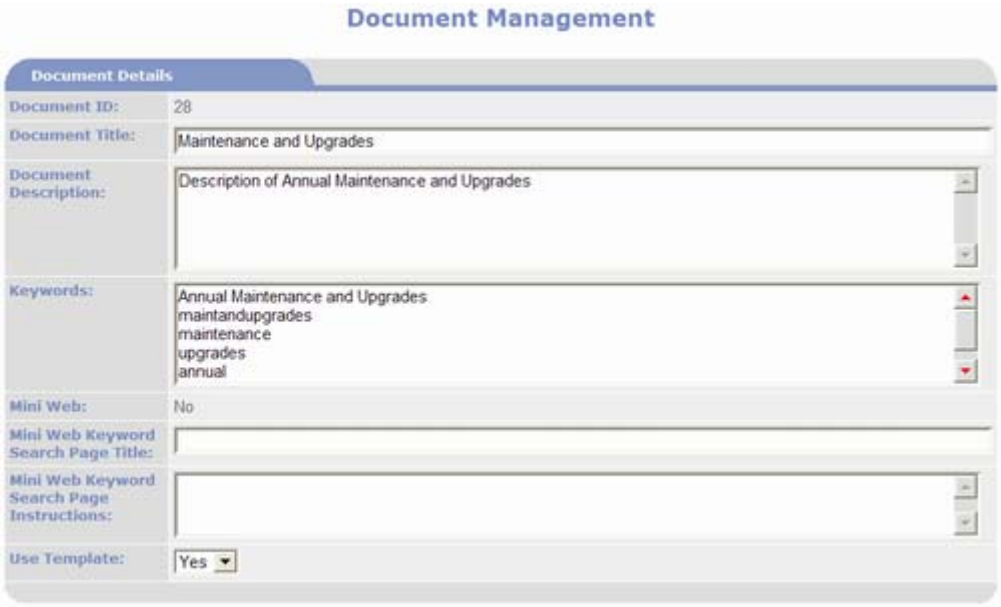
When finished entering your search criteria, click on the Search button.
If there are matches, they are displayed as follows:

When there are no matches the results grid is displayed as follows with Total Matches 0:

1.5.10 Update Document from Administration of the Site:

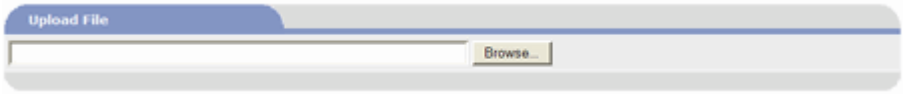
Use the Search for Documents page to find the document to update.

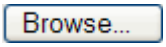
Click on the Document's name in the list of Found Documents. (See the previous section Search for Documents from Administration Portion of Site.) This displays the Document Management page.



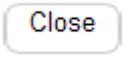
You may edit any information about the document including the documents name.

To update the document file, click the icon.



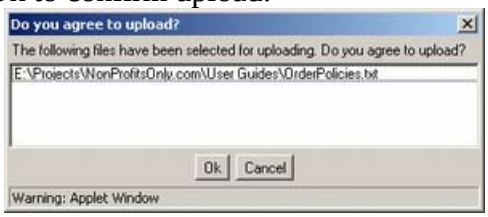
Click on the  button to locate and select the appropriate document (file) that is stored on your system.

The path and file name are then displayed in the Upload File text box.

Click on the  button to upload the document.

The first time you upload a document from a computer using PORTALPRODIGY, you will be prompted to install an Active-X component from Software Artisan's. PORTALPRODIGY uses this component to efficiently and reliably load documents via the HTML protocol. If this sounds entirely too technical, just answer Yes and leave it at that. You will not prompted to do this again, unless you change your computer configuration.

Click Ok to confirm upload:



- **Transfer Status window** - This window provides a status of the file transfer. It will close automatically when the transfer has been completed and the following Success message will be displayed.

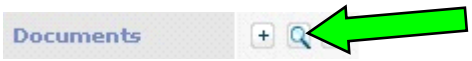
- **Confirmation Message:** at this point the document file has been successfully updated. You may click Ok to return to the previous page or select any link from the available menu options.

If the only change you made is to upload a new document file it is not necessary to use Save or Close and save options in the Document Management page. If you changed any other data elements within the Document Management page you must select Save or Close and then confirm to save the changes.

1.5.11 How to Promote a Resource on the Home page:

Use this to include a document in the Resource Mini Browser displayed on your site's home page. Note that this feature must be enabled in Greeting Features Management.

The Search for Documents page is reached by clicking on the Documents Browse Button



located in the Content Management menu column of the Main Administration Menu (Ctrl-Atl-m).

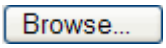
Locate and select the document using Search for Documents.

Retrieve the document in Document Management.

Set Include Link On Home Page to *Yes*.

The Home Page Sort Order defaults to 0. You may leave this as is and PORTALPRODIGY will display the documents in the Resource Mini Browser in alphabetical order on Documents Title. To control the sequence enter an integer value for the order.

You may select to have the document listed with a bullet next to it or an image. It defaults to *Bullet*.

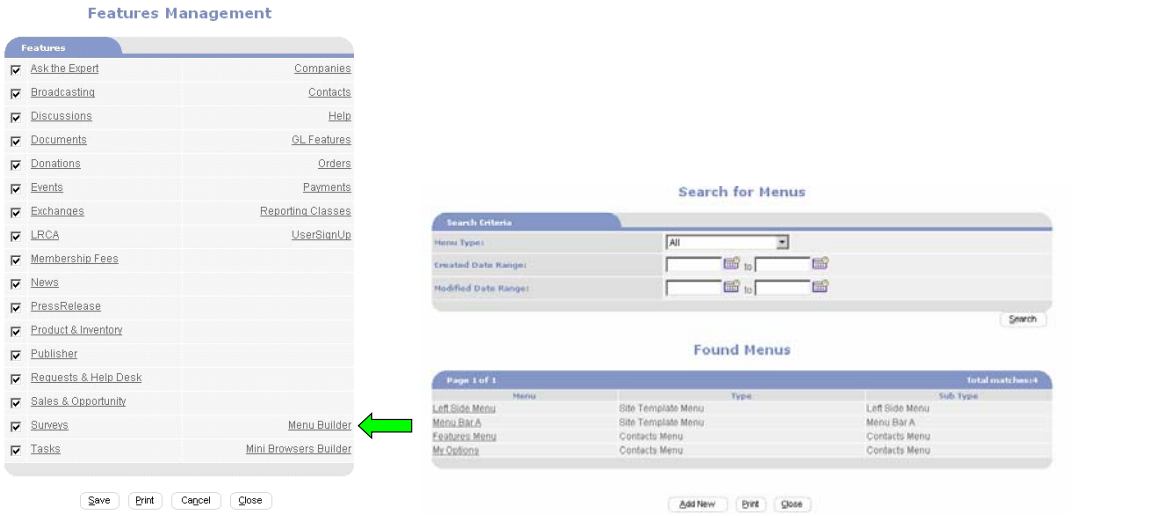
Click the 

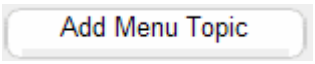
button to load an image. PORTALPRODIGY automatically resizes the image to fit the Resource Mini Browser.

1.5.12 Adding Documents to Menus:

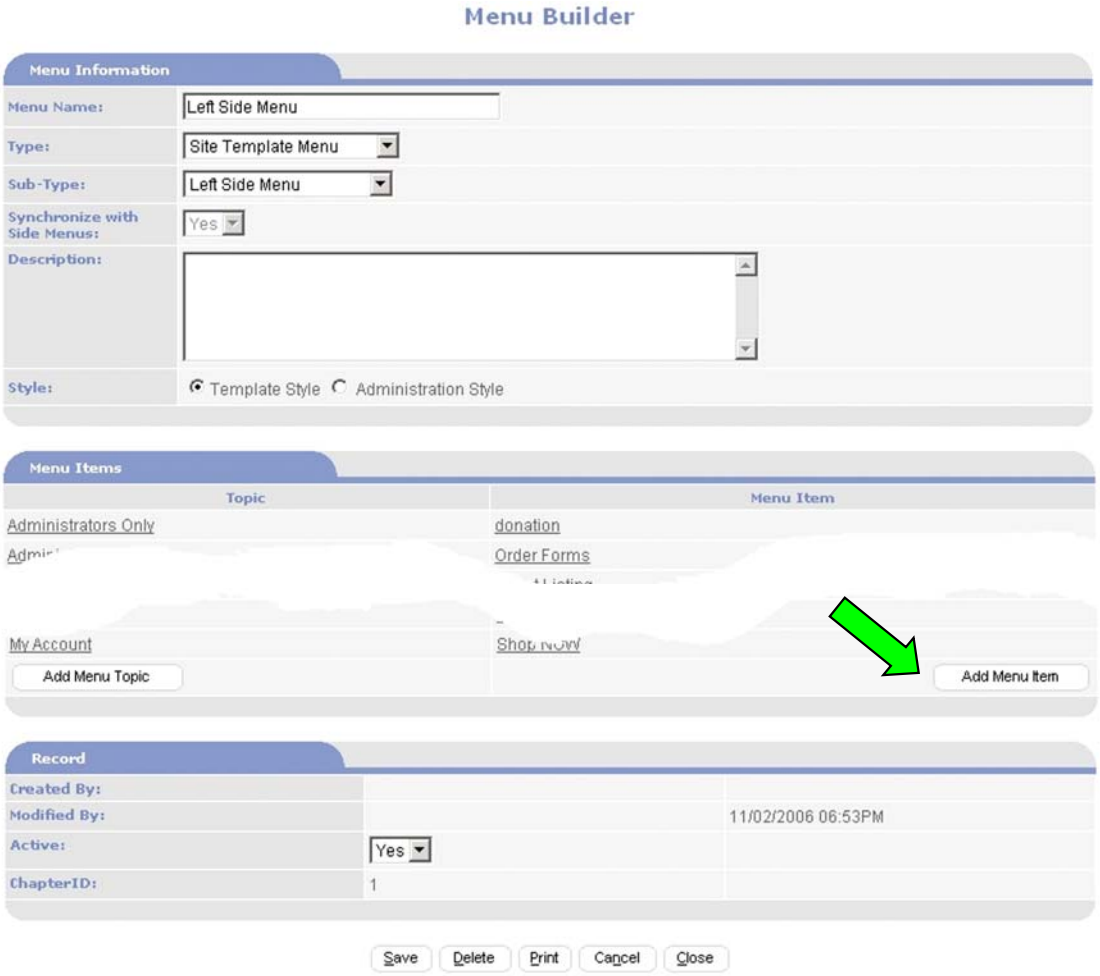
Use this to add a menu link to a document that is stored in the Document Resource Library. PORTALPRODIGY allows an unlimited number of links to a single document.

Retrieve the applicable menu using the Menu Builder feature. (See the Features Management Chapter Menu Builder section.)

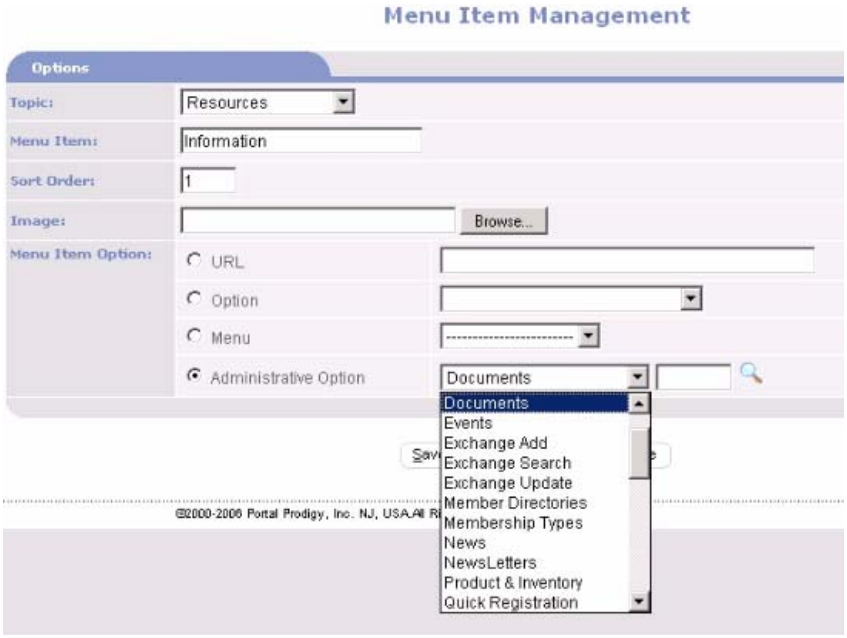


If you need to create a new topic, on the Menu Builder page click 

button. (See the Features Management Chapter Menu Builder section for additional details.)



From the Menu Builder page click Add Menu Item button.



Topic: Select a Topic.

Menu Item - Enter the descriptor to be displayed in the menu.

Sort Order - Enter an integer corresponding to the desired order of the menu item.

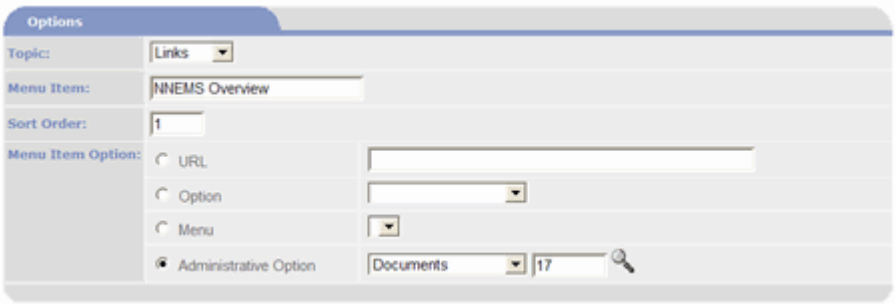
Click on the *Administrative Option* radio button.

Select Documents from the drop down list box.

If you know the Documents ID you may enter into the text box; otherwise click on the icon to select a document using the Search for Documents page.

Enter Search Criteria. (See the section Search for Documents from Administrative Portion of Site for additional instructions.)

When finished entering your search criteria, click on the Search button.
Locate the document in the Found Documents matches and select by clicking on the Document ID or the Document Name. PORTALPRODIGY will return to the Menu Item Management paid with the Documents ID displayed as shown below.



Click on Save or Close option buttons to save the new Menu Item. When using Close, be sure to confirm save when prompted.

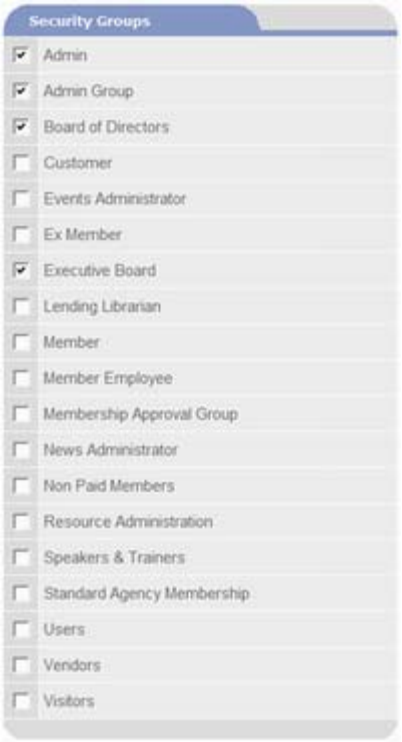
1.5.13 How to Make a Document Private:

By default, documents are made available to everyone who has access to the Resource Library. Use the following steps to secure a document and limit access to permitted users.

Retrieve the document using Search For Documents page.

In the Record tab section set Private to YES.

When Private is set to YES the Security Groups tab section is displayed just below the option buttons at the bottom of the page.



Check each Security Group that is permitted to access the document. See the Chapter on Security for additional information including how to create new Security Groups and how to assign users to Security Groups.

Click on Save or Close option buttons to save the new settings.

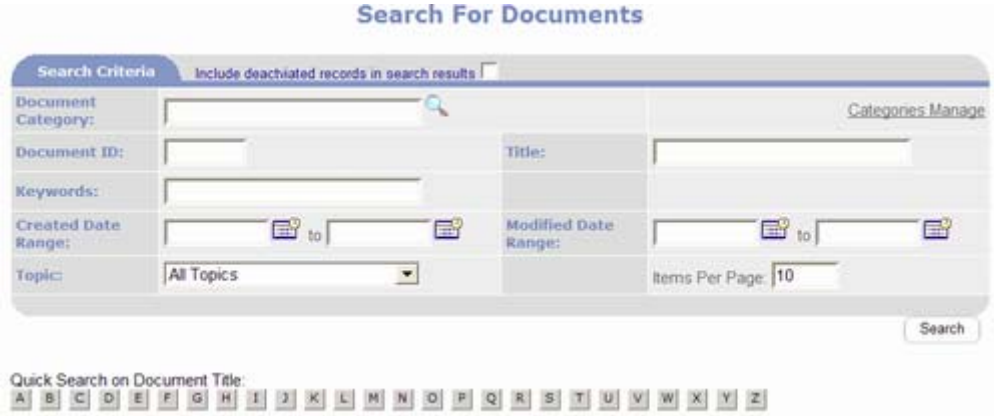
You may also control access to documents by limiting access to Document Categories (see the following section How To Make a Document Category Private) and by limiting access to the Documents Resource Library (see the Chapter on Security).

1.5.14 How to Make a Document Category Private:

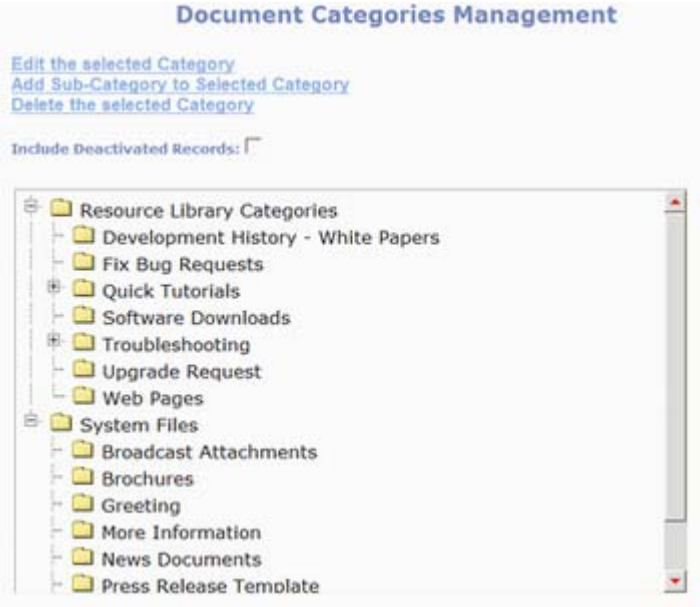
By default, Document Categories are made available to everyone who has access to the Resource Library. Use the following steps to secure a Category and limit access to permitted users.

Go to the Site Administration menu

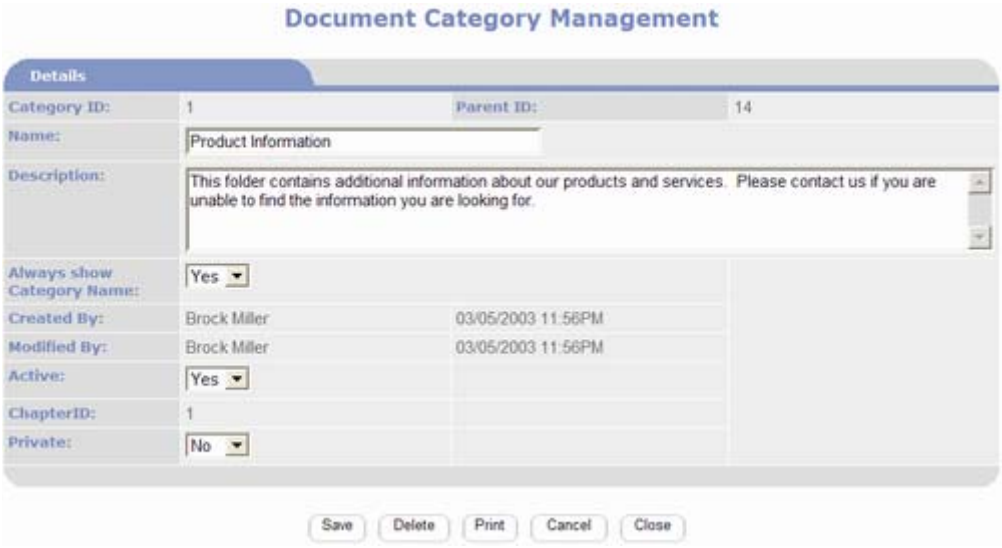
Click the Document icon to display the Search For Documents page.



Click on the Categories Manage link to go to the Document Categories Management page shown below.



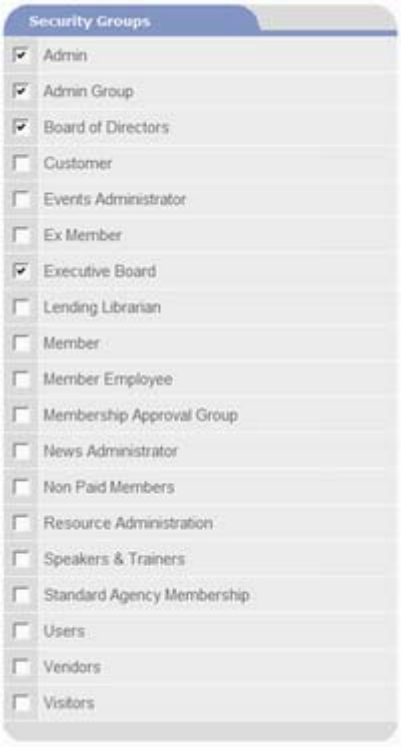
Click on the name of the Category you want to make private then click Edit the Selected Category. This will display the Document Category Management page shown below.



If you want visitors to see the Category name even though they do not have permission to access it, set Always Show Category Name to *Yes*. Visitors without access permission will receive a message notifying them that they do not have permission to view the Categories contents. This is a great way to encourage visitors to signup or to become a member. To hide the Category name from users that do not have access permission set Always Show Category Name to *No*.

Set Private to *Yes*.

When Private is set to YES the Security Groups tab section is displayed just below the option buttons at the bottom of the page.



Check each Security Group that is permitted to access the Category. See the Chapter on Security for additional information including how to create new Security Groups and how to assign users to Security Groups.

When finished click on Close and confirm save when prompted.

You may also control access to documents by limiting access to the Resource Documents Library (see the Chapter on Security).

1.6 Special Situations

1.6.1 Large document files:

If the document shall be viewed directly from the website, as opposed to being downloaded to the user's computer, it is best to break larger files into several smaller files.

1.6.2 Downloading HTML Pages:

HTML Documents that contain images, scripts or style sheets are downloaded as a single compressed zip file that contains the .htm page and all the related files. These files require an unzipping tool such as WinZip to open them.

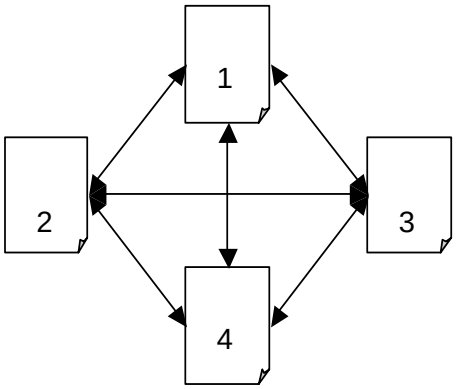
1.6.3 How to Use Document Editor to create new Documents.

Want to use the PORTALPRODIGY Document Editor to create a new document, but the Document Management page does not have an Add or Edit button, it only offers a Browse button, what do you do?

The solution is to load an empty HTML document. You can create an empty HTML document in MS Word by saving a blank page as HTML. Load the empty document using the Browse button on the Document Management page. When you open the document in the PORTALPRODIGY Document Editor, check the HTML checkbox located in the lower left corner of the page. Erase everything. Uncheck the HTML checkbox. You are now ready to begin typing your document. When finished, click Save.

1.6.4 Linking Multi-Page Resource Documents

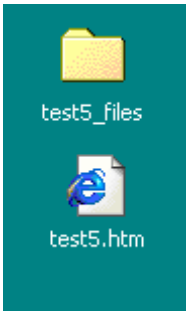
There may be times when an administrative user wishes to add a resource that consists of several linked pages. The schematic below represents four below separate pages (HTML documents) that are to be imported as one resource document.



When the PortalProdigy System imports an HTML document it imports the main or starting HTML page and its related folder. One can demonstrate this by saving a web page using MS Internet Explorer. For example: Visit http://www.PortalProdigy then save onto your desktop, as an HTML file, titled:

`test5.`

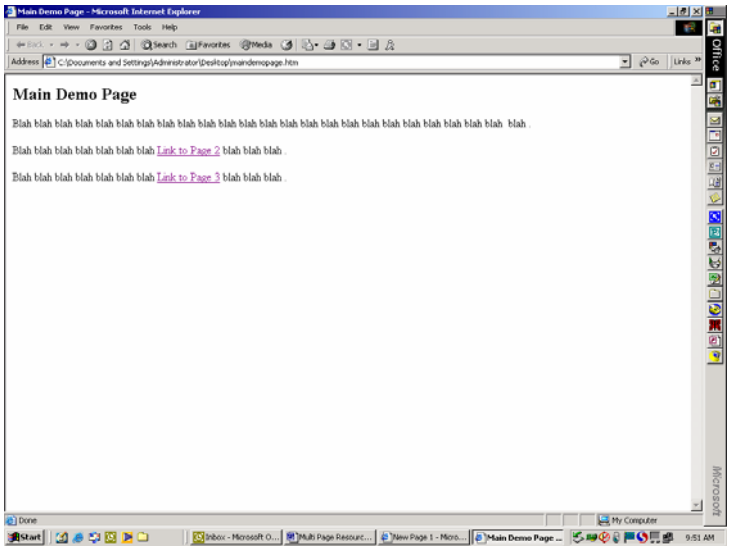
The following should appear on your desk top:

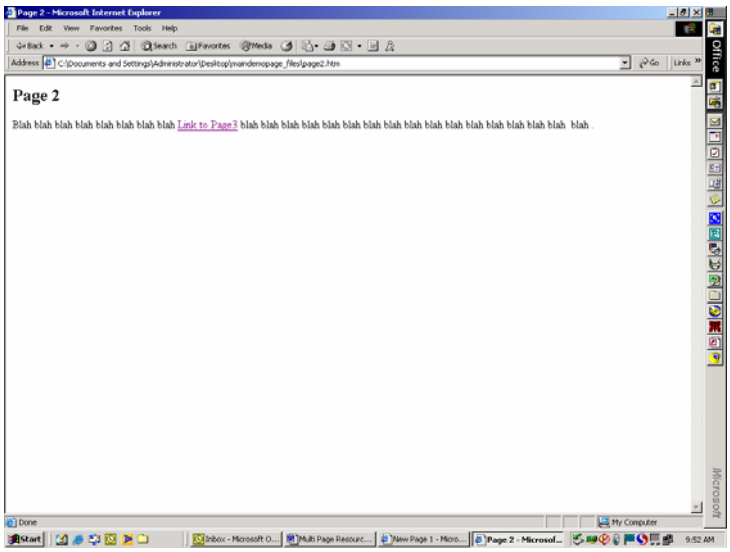


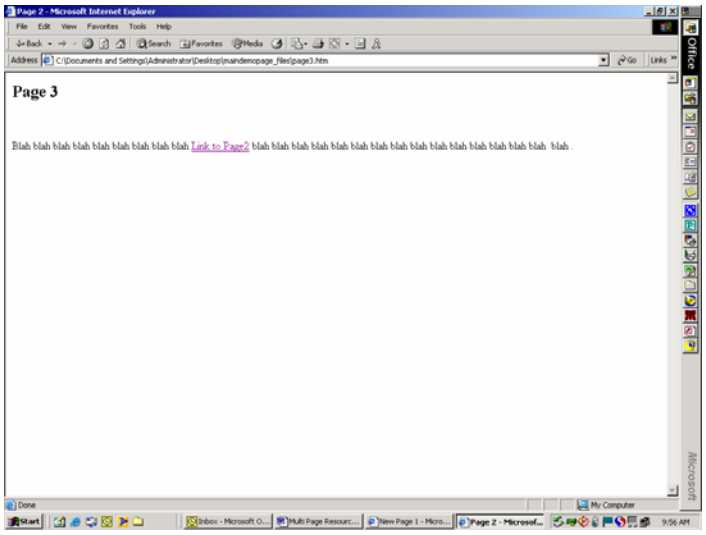
The file labeled *test5.htm* is the main HTML page and the folder labeled *test5_files* contains supporting files such as images. Notice that the naming protocol for the folder (also known as *directory* or *subdirectory*) contains the name of the HTML file without the .htm extension followed by *_files.* This is the naming protocol that must be used for all HTML document to imported by the Document Manager feature. Some examples:

HTML File Name	**Folder Name**
Important.htm	Important_files
newlaws.htm	newlaws_files
17289902.htm	17289902_files

How would we prepare the following three pages, with links to each other, for import into the Resource Document Library?


Main Demo Page - Microsoft Internet Explorer
Main Demo Page
Blah blah blah





Method 1: Using this method prevents the site's style sheets (borders and headers) from appearing on the sub pages (pages 1 and 2) which may be desirable in some cases. Furthermore, sub pages, such as pages 2 and 3, would not be available to visitors from the Resources search and browse functions.

Create each page using your favorite HTML editor. Be sure to turn off all non-html option such as XML, java, etc. Save the Main Demo Page to your desk top labeled *maindemopage.htm.* Save the other two pages in a folder labeled *maindemopage_files.*

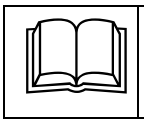
The hyperlinks used in the code of the Main Demo Page should like like this:

```
<a href="maindemopage_files/page2.htm">
<a href="maindemopage_files/page3.htm">
```

The hyperlinks used in the code of pages 2 and 3 should like like this:

```
<a href="page2.htm">
<a href="page3.htm">
```

From the Site Administration Interface, select the Document Add function and import the *maindemopage.htm* file as you normally would. The system will automatically import all the documents in the file labeled *maindemopage_files.*



Rule: *All linked objects, such as pages, images etc., to be imported with an HTML document, must be stored in one directory which is labeled following the naming protocol described herein.*

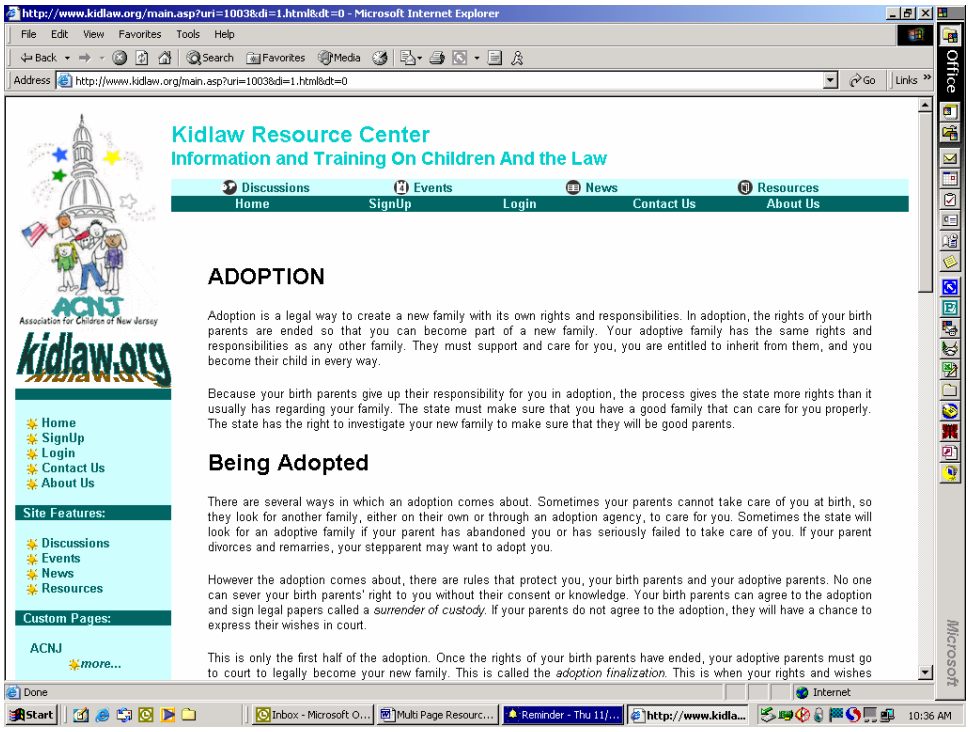
Method 2: Using this method causes all the imported pages to be accessed by visitors using the Resources search and browse methods. It also causes the site's style sheets (borders and headers) to be included on each page.

Create each page using your favorite HTML editor but **do not** enter the hyperlinks to each other page yet. Be sure to turn off all non-html option such as XML, java, etc. Save each file.

From the Site Administration Interface, select the Document Add function and import each file as you normally would.

Visit the home page of your website and locate one of the pages which were imported. Note that when you open the page in your browser that an address similar to the following appears:

`http://www.kidlaw.org/main.asp?uri=1003&di=1.html&dt=0`



That is the *URL address* of the page displayed.

In order to link from another page to the page displayed, one simply inserts a command such as:

```
<A href="http://www.kidlaw.org/main.asp?uri=1003&di=1.html&dt=0">
```

into the HTML code.

Visit each Resource Document for which you wish to enter hyperlinks and list their URL address in a convenient place. Then, using the Document Manager feature, *check out* the Resource Document you wish to add links to and insert the desired href command into the html code then import the updated page into the Resource Library.