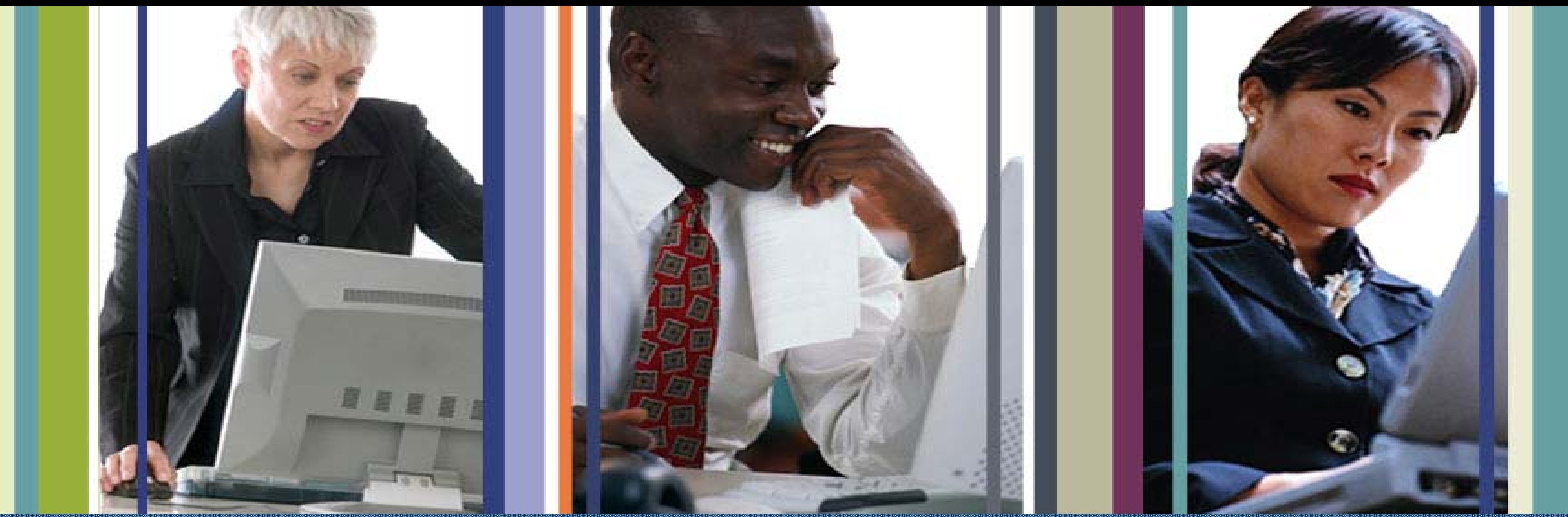
DAS
DEPARTMENT OF ADMINISTRATIVE SERVICES
HUMAN RESOURCE SERVICES DIVISION

MODULE 3 – CONTENT MANAGEMENT

Enterprise Learning Management System



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Module Information

Module Name:	CONTENT MANAGEMENT
Module Topics:	1. Types of Site Content 2. Managing Content
Module Introduction:	There are three types of roles and permissions in the LMS – system, automatic and view/launch/manage permissions. Content management is primarily administered by the system role – Content Manager. However, additional content administrator rights are triggered by a specific event automatically or assigned by default depending on the type of content added to the site. In this module, content is defined as all *non-course* content (content which is not associated with a specific training event). The module will provide a description and step-by-step instructions for the key system role which manages non-course content – the Content Manager. Other automatic roles and permissions having various non-course content rights will also be discussed.
Module Objective:	After completion of this module, students will be able to manage site content, to include all non-course content, references, and non-course related collaboration spaces.
Module Duration:	1 hour
Instructor Notes:	Target Audience: Content Managers and Administrators. Access to the functions explained in this course requires special permissions that are set in the site by the Domain Administrator. The permissions control what content the different levels of users can both see and modify. The general user cannot see and, therefore, cannot use these features.

Lesson Information

Lesson Name:	LESSON 1: TYPES OF SITE CONTENT
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Understand the general definition of course and non-course content in the LMS. • Understand the functionality of the Reference and Collaboration Center in the LMS.
Lesson Introduction:	While much of the content in the LMS will be associated with a specific course (pre/post-work and/or other course material), there are a number of other types of content which pertain to specific user/groups/communities. This type of content is contained in the Reference and Collaboration Center in the LMS.
Lesson Duration:	10 minutes
Instructor Notes:	Location: Administration/Manage Content Permission Level: Requires membership in either of the administrator roles or in the content manager role.

1.1 OVERVIEW

Content management is a general term which defines both course and non-course related content in the LMS. While much of the content in the LMS will be associated with a specific course (pre/post-work and/or other course material), there are a number of other types of content which pertain to specific user/groups/communities. For example, a subject matter expert for project management may want to communicate/share documents, best practices, etc. with other project managers within the system.

The Manage Content area is where users with the appropriate permission create and manage content items such as documents and surveys. With the exception of blogs, glossary terms and surveys, the same content items that are created and managed in this area can also be created and managed in the Reference Center.

1.2 SHARED CONTENT

The Shared Content area is where authorized users select available content to add to a domain. When creating new content, authorized users can elect to share content or push content. By default, when content is created, it exists in the creating domain only (is not pushed or shared). If the authorized user has elected to share content, it is automatically displayed in this area and the authorized user can elect to add it to the select domain(s). If the authorized user has elected to push content, the content will be added or either made available to add later.

If the content has been designated as an optional push, the content will be pushed to all selected descendant domains and can be removed by the authorized user of the recipient domain. If the content has been designated as a required push, the content will be pushed to all selected descendant domains but cannot be removed by the authorized user of the recipient domain.

1.3 TYPES OF SITE CONTENT

The LMS has two non-course functions designed to provide users with the ability to access key organizational information as well as communicate with others in the system – Reference and Collaboration Centers.

The Reference Center is where announcements, miscellaneous documents, frequently asked questions (FAQ) and site surveys are located.

- *Announcements*: general agency information and important communications.
- *Miscellaneous Documents*: files and references of various types such as white papers, presentations and web sites.
- *Frequently Asked Questions (FAQs):* FAQs are questions with answers and a source for each answer.

- *Glossary*: contains terms, definitions for terms and related terms that are used in the system.
- *Site Surveys*: collections of questions used to gather feedback and opinions about a particular topic.

The Collaboration Center is where users can communicate and share documents with others users in the system. It includes blogs, user and instructor directories, and collaboration spaces.

- *Blogs*: the term blog is actually a blending of the words web and log. It is a communication site that contains thoughts, reflections, comments, and often hyperlinks provided by the writer. In simplest terms, a blog allows people with similar interests to communicate freely.
- *User Directory*: find registered users of the site.
- *Instructor Directory*: find instructors.

Lesson Information

Lesson Name:	LESSON 2: MANAGING CONTENT
Lesson Objectives:	Upon completion of this lesson, the learner will be able to: • Demonstrate the functionality of all non-course content, including: o Announcements o Blogs o Documents o FAQs o Glossary o Surveys o Shared Content
Lesson Introduction:	This lesson provides a description of, and step-by-step instructions for, managing non-course content available in the reference center and collaboration center.
Lesson Duration:	50 minutes
Instructor Notes:	Location: Administration/Manage Content Permission Level: Requires membership in either of the administrator roles or in the content manager role. The workflow steps for creating all of the non-course content are very similar. Choose one or two types of content and walk the students through the steps and then have then add different content types to the system.

2.1 ANNOUNCEMENTS

Announcements are information or important communications intended for all users. Announcements are listed in descending order with the most recently posted announcement first. Announcements in this area are separate from Announcements within collaboration spaces.

Some examples of announcements are:
- Upcoming meetings and events (or changes to them).
- Notification of new courses, content or features in the system.

2.1.1 WORKFLOW FOR CREATING ANNOUNCEMENTS

Any user assigned the content manager role can create an announcement within their domain. The workflow for creating a new announcement consists of the following:

1. *Edit Announcement Summary*: Summary information allows users to easily find the announcement when they perform searches. This information includes the title of the announcement, the text for the announcement, and a URL.

2. *Edit Window Attributes*: This is where you specify the window dimensions and other aspects of the window (e.g., presence of toolbars, ability to resize the window) in which the content displays.

3. *Assign Permissions*: This is where you search for roles, users and organizations to assign a permission to view, launch, or manage an announcement. Roles, organizations, and users already assigned a permission for the announcement are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Permissions can be changed at any time.

4. *Edit Announcement Activity*: In order to make an announcement active or inactive you must complete the Edit Activity workflow step. By default, after creating a new announcement it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive announcements are stored in the system and are only viewable or

searchable by authorized users when specifically searching for it using the Advanced search.

5. *Share the Announcement*: This is where you indicate how your announcement is shared. By default, when a announcement is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.

6. *Check in the Announcement*: Select the Check In tab when you have completed setting up the announcement so that users may access it.

2.1.2 CREATE AN ANNOUNCEMENT STEP-BY-STEP INSTRUCTIONS

1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Announcements.
4. Select "Create New" from the Page menu.
5. Click Go to access the Edit Summary page.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Title	The name of the announcement. Character
*Announcement	The text of the announcement.
URL	If there is an Internet or intranet location as announcement, type it in this field. Note: If y the format "URL.com", then "http://www." is added before "URL.com". If you type a URL format (e.g., ftp://URL.com, www.URL.com, then "http://www." is not added.

7. Click the Comments tab to add comments about the announcement.
8. Preview the information by clicking the Preview tab.
9. Click Create.

To edit window attributes:

10. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
11. Change the width of the window in the Width field. This

value must be in pixels.

12. Change the height of the window in the Height field. This value must be in pixels.
13. Click Preview to view what the window will look like based on your selections.
14. Continue changing the attributes and previewing them until you are satisfied.
15. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add permissions for a role/organization/user:

16. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
17. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
18. Click Save. A message displays at the top of the page indicating the permissions were updated.
19. Click Return to go back to the Search page for announcements or click another workflow step.

To set an activity:

20. Select the Edit Activity tab.
21. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
22. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
23. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
24. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the announcement with other domains:

25. Click the Content shared to other domains button. The checkboxes in the table are enabled.
26. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks.

Note: For each domain, only one option can be checked.

27. Click Save.
28. Click Return to go back to the previous page.
29. Select the Check In tab when you have completed creating the announcement so that users may access it, and the "Available" icon displays for the announcement in the Editing Status column in search results.

2.1.3 DELETE AN ANNOUNCEMENT

1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Announcements.
4. Search for the announcement you want to delete.
5. Click the checkbox to the left of the title of the announcement you want to delete. You may select multiple announcements to be deleted.
6. Click Delete at the bottom of the Search tab. A confirmation window displays.
7. Click OK to delete the announcement. It is no longer displayed in the table on the Search tab.

2.2 BLOGS

A blog (short for "weblog") is a shared online journal where people can add information in the form of posts and comments that are related to the topic of the blog. Blogs are used for communicating and idea-sharing. They are asynchronous (all users do not have to participate at the same time; users can post to blogs at any time).

2.2.1 WORKFLOW FOR CREATING BLOGS

Any user assigned the content manager role can create a blog within their domain. The workflow for creating a new blog consists of the following:

1. *Edit Blog Summary*: Summary information allows users to easily find the blog when they perform searches. This information includes the title of the blog, the description of the blog, and keywords.

2. *Select Categories*: This is where you choose which category or categories contain this content. Categories are used to organize content within the system.

3. *Edit Window Attributes*: This is where you specify the window dimensions and other aspects of the window (e.g., presence of toolbars, ability to resize the window) in which the content displays.

4. *Access Approval*: This is where you select which approval path will be used when a user requests access to this content. Approval paths are created and managed at the enterprise level. Then the paths are assigned to content so that when users request access to content, the request is approved or denied by the users within the approval path. Content can only have one approval path. Access approval is optional.

5. *Assign Permissions*: This is where you search for roles, users and organizations to assign a permission to view, launch, or manage a blog. Roles, organizations, and users already assigned a permission for the blog are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Permissions can be changed at any time.

6. *Edit Blog Activity*: In order to make a blog active or inactive you must complete the Edit Activity workflow step. By default, after creating a new blog it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive blogs are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

7. *Share the Blog*: This is where you indicate how your blog is shared. By default, when a blog is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.

8. *Check in the Blog*: Select the Check In tab when you have completed setting up the blog so that users may access it.

2.2.2 CREATE A BLOG STEP-BY-STEP INSTRUCTIONS

1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Blogs.
4. Select "Create New" from the Page menu.
5. Click Go to access the Edit Summary page.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Title	The name of the blog.
*Description	An explanation of the blog.

*Keywords	Words and phrases that relate to the blog that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find the blog.

7. Click the Comments tab to add comments about the announcement.
8. Preview the information by clicking the Preview tab.
9. Click Create.

To select categories for the blog:

10. Click the plus (+) sign to expand the tree and view the available categories.
11. Click the checkbox next to a category for the content. You may select multiple categories.
12. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To edit window attributes:

13. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
14. Change the width of the window in the Width field. This value must be in pixels.
15. Change the height of the window in the Height field. This value must be in pixels.
16. Click Preview to view what the window will look like based on your selections.
17. Continue changing the attributes and previewing them until you are satisfied.
18. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add an access approval path:

19. Click Yes next to "Access Approval Required." (This step is only needed when a path is not already selected.)
20. Review the list of existing access approval paths to find the one you want to use. You may also use the search fields (Search Text, Search Type) to find an approval path faster.
21. Click the button to the left of the approval path you want to use.
22. Click Save. Note: If changing an access approval path, a confirmation message displays regarding the consequences of changing the path and you click OK. In both instances (selecting a path for the first time and changing a path), a message displays at the top of the page indicating the approval path was associated with the content.

To add permissions for a role/organization/user:

23. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.

24. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
25. Click Save. A message displays at the top of the page indicating the permissions were updated.
26. Click Return to go back to the Search page for announcements or click another workflow step.

To set an activity:

27. Select the Edit Activity tab.
28. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
29. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
30. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
31. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the blog with other domains:

32. Click the Content shared to other domains button. The checkboxes in the table are enabled.
33. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
34. Click Save.
35. Click Return to go back to the previous page.
36. Select the Check In tab when you have completed creating the blog so that users may access it, and the "Available" icon displays for the blog in the Editing Status column in search results.

2.2.3 DELETE A BLOG

1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Blogs.
4. Search for the blog you want to delete.
5. Click the checkbox to the left of the title of the blog you want to delete. You may select multiple blogs to be deleted.
6. Click Delete at the bottom of the Search tab. A confirmation window displays.
7. Click OK to delete the blog. It is no longer displayed in the table on the Search tab.

2.2.4 BLOG POSTS

Once a blog is created then users who have the appropriate permission will be able to post to the blog. Search Posts is where you search for postings that have been made to a blog(s). A search is performed across all posts that have been made for all blogs in the system (except blogs within collaboration spaces). You can search all postings (choose "All Authors") or only postings you have made (choose "Me").

For each post, the following is displayed:

- Name of the post, which is a link to access the full text of the post (only the first 500 characters of the post, including the spaces between words, are displayed here) and view all existing comments
- Date the post was created and the name of the person who created it
- The total number of comments for the post
- Links to add comments (both the total number and the word "Comments" are links that allow you to add a comment; the name of the post is a link to this same page)
- Links to edit and delete the post (authorized users only, such as site administrators and the creator of the post)
- Any user may add a post to any blog, unless an authorized user has restricted access to a blog. The same is true for adding comments. If you add a post or a comment, only you may edit or delete the post or comment. All users may view all posts and comments.
- The most recent post is listed at the top of the page (and the oldest post at the bottom of the page). The information that is displayed on this page for the post is the same information you see when you click any of the following links: name of the post, total number of comments for the post, the word "Comments". After clicking any of these three links, the page that displays allows you to edit or delete the post, add comments about the post and view existing comments.

To add a post to a blog:

1. Click Collaboration Center.
2. Click Blogs.
3. Enter the keywords for the blog you want to post to.
4. Click Search (opens a new window) to view a list of posts that match your search criteria. Click the title of the blog to view the posts.
5. Click Create New to post to the blog.
6. The Create New window displays.
7. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Title	The name of the post.
*Description	Text you want displayed on the blog post.

URL	If there is an Internet or intranet location associated with the post, type it in this field. Note: If you type a URL in the format "URL.com", then "http://www." is automatically added before "URL.com". If you type a URL in any other format (e.g., ftp://URL.com, www.URL.com, https://URL.com), then "http://www." is not added.
Image	The file path for an image must be present in this field if you want an image to be *displayed* in the post. When uploading images, the following are acceptable file types: gif, jpg, jpeg and bmp.

8. Click Create. The main page for the blog displays with the new post along with the date the post was created and the name of the person who created it.

2.3 DOCUMENTS

Documents are files (e.g., PDF files, Microsoft Word files) that can be uploaded to the system or referenced from a remote location with a URL. Documents are shared files that can be viewed by users of the system. If you only want a particular user or group of users to view the document, then use access approval to ensure that only approved users may view the document.

2.3.1 WORKFLOW FOR CREATING DOCUMENTS

Any user assigned the content manager role can create a document within their domain. The workflow for creating a new document consists of the following:

1. *Edit Document Summary*: Summary information allows users to easily find the document when they perform searches. This information includes the title of the document, the description of the document, and keywords.

2. *Upload Document*: This is where you upload the document to the system or indicate the internet/intranet (URL) location of the document. The generally accepted file types are: gif, jpg, jpeg, bmp, txt, doc, xml, xls, mpeg, mpg, mp3, wav, htm, html, ppt and pdf.

3. *Select Categories*: This is where you choose which category or categories contain this content. Categories are used to organize content within the system.

4. *Edit Window Attributes*: This is where you specify the window dimensions and other aspects of the window (e.g., presence of toolbars, ability to resize the window) in which the content displays.

5. *Access Approval*: This is where you select which approval path will be used when a user requests access to this content. Approval paths are created and managed at the enterprise level. Then the paths are assigned to content so that

when users request access to content, the request is approved or denied by the users within the approval path. Content can only have one approval path. Access approval is optional. If a path has already been selected and is currently in use, it is displayed at the top of the tab next to "Current Approval Path."

6. *Assign Permissions*: This is where you search for roles, users, and organizations to assign a permission to view, launch, or manage a document. Roles, organizations, and users already assigned a permission for the document are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Permissions can be changed at any time.

7. *Edit Document Activity*: In order to make an document active or inactive you must complete the Edit Activity workflow step. By default, after creating a new document it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive documents are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

8. *Share the Document*: This is where you indicate how your document is shared. By default, when a document is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.

9. *Check in the Document*: Select the Check In tab when you have completed setting up the document so that users may access it.

2.3.2 CREATE A DOCUMENT STEP-BY-STEP INSTRUCTIONS

1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Documents.
4. Select "Create New" from the Page menu.
5. Click Go to access the Edit Summary page.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Title	The name of the document.
*Description	An explanation of the document.
*Keywords	Words and phrases that relate to the document that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find the document.

7. Click the Comments tab to add comments about the announcement.

8. Preview the information by clicking the Preview tab.
9. Click Create.

To upload the document:

10. Select either the "File Name" or "URL" button. If using File Name, then click Browse, locate the document, and select it by double-clicking it. If using URL, type the valid URL for the document. Notes: If you are editing an existing document, the current document name/URL is displayed in the Current Document area.
11. If you type a URL in the format "URL.com", then "http://www." is automatically added before "URL.com". If you type a URL in any other format (e.g., ftp://URL.com, www.URL.com, https://URL.com), then "http://www." is not added.
12. Click Create. A message displays indicating the document was created, and the Select Categories tab displays (if you are in "Documents" in the Reference Center) or the Edit Window Attributes tab displays (if you are within a collaboration space).

To select categories for the document:

13. Click the plus (+) sign to expand the tree and view the available categories.
14. Click the checkbox next to a category for the content. You may select multiple categories.
15. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To edit window attributes:

16. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
17. Change the width of the window in the Width field. This value must be in pixels.
18. Change the height of the window in the Height field. This value must be in pixels.
19. Click Preview to view what the window will look like based on your selections.
20. Continue changing the attributes and previewing them until you are satisfied.
21. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add an access approval path:

22. Click Yes next to "Access Approval Required." (This step is only needed when a path is not already selected.)
23. Review the list of existing access approval paths to find the one you want to use. You may also use the search fields (Search Text, Search Type) to find an approval path faster.
24. Click the button to the left of the approval path you want to use.

25. Click Save. Note: If changing an access approval path, a confirmation message displays regarding the consequences of changing the path and you click OK. In both instances (selecting a path for the first time and changing a path), a message displays at the top of the page indicating the approval path was associated with the content.

To add permissions for a role/organization/user:

26. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
27. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
28. Click Save. A message displays at the top of the page indicating the permissions were updated.
29. Click Return to go back to the Search page for announcements or click another workflow step.

To set an activity:

30. Select the Edit Activity tab.
31. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
32. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
33. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
34. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the document with other domains:

35. Click the Content shared to other domains button. The checkboxes in the table are enabled.
36. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
37. Click Save.
38. Click Return to go back to the previous page.
39. Select the Check In tab when you have completed creating the blog so that users may access it, and the "Available" icon displays for the blog in the Editing Status column in search results.

2.4 FREQUENTLY ASKED QUESTIONS (FAQ)

FAQs are questions containing answers and the source of the answer. FAQs are posted so that everyone may benefit from having access to information that others have found and entered into the system.

2.4.1 WORKFLOW FOR CREATING FAQ

Any user assigned the content manager role can create a FAQ within their domain. The workflow for creating a new FAQ consists of the following:

1. *Edit Question*: This is where you enter your FAQ and save it. This is also where you make changes to existing questions.

2. *Edit Answer*: This is where you add, change and delete answers for the FAQ. An unlimited number of answers may be entered for each FAQ. At least one answer is required for each FAQ. They are displayed in a table and each answer can be edited using the Edit option in the Action menu.

3. *Select Categories*: This is where you choose which category or categories contain this content. Categories are used to organize content within the system.

4. *Edit Window Attributes*: This is where you specify the window dimensions and other aspects of the window (e.g., presence of toolbars, ability to resize the window) in which the content displays.

5. *Assign Permissions*: This is where you search for roles, users, and organizations to assign a permission to view, launch, or manage a FAQ. Roles, organizations, and users already assigned a permission for the FAQ are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Permissions can be changed at any time.

6. *Edit FAQ Activity*: In order to make a FAQ active or inactive you must complete the Edit Activity workflow step. By default, after creating a new FAQ it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive FAQs are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

7. *Share the FAQ*: This is where you indicate how your FAQ is shared. By default, when a FAQ is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.
8. *Check in the FAQ*: Select the Check In tab when you have completed setting up the FAQ so that users may access it, and the "Available" icon displays for the FAQ in the Editing Status column in search results.

2.4.2 CREATE A FAQ STEP-BY-STEP INSTRUCTIONS

1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click FAQs.
4. Select "Create New" from the Page menu.
5. Click Go.
6. Type the question or change the existing one in the Question field.
7. Click Create.

To add answers:

8. Type an answer in the Answer field.
9. Type the source of your answer in the Source field.
10. Click Add Answer. The answer is displayed in a table on the Edit Answers tab with an Action menu.
11. Continue to add answers by following the above steps. (Optional)
12. Click Return to return to the FAQ Search page or click another workflow step.

To select categories for the document:

13. Click the plus (+) sign to expand the tree and view the available categories.
14. Click the checkbox next to a category for the content. You may select multiple categories.
15. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To edit window attributes:

16. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
17. Change the width of the window in the Width field. This value must be in pixels.
18. Change the height of the window in the Height field. This value must be in pixels.
19. Click Preview to view what the window will look like based on your selections.
20. Continue changing the attributes and previewing them until you are satisfied.
21. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add permissions for a role/organization/user:

22. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
23. Click the checkboxes to either place checkmarks in, or remove checkmarks from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change

permissions for multiple entities at the same time.

24. Click Save. A message displays at the top of the page indicating the permissions were updated.
25. Click Return to go back to the Search page for FAQs or click another workflow step.

To set an activity:

26. Select the Edit Activity tab.
27. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
28. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
29. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
30. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the FAQ with other domains:

31. Click the Content shared to other domains button. The checkboxes in the table are enabled.
32. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
33. Click Save.
34. Click Return to go back to the previous page.
35. Select the Check In tab when you have completed creating the FAQ so that users may access it, and the "Available" icon displays for the FAQ in the Editing Status column in search results.

2.5 GLOSSARY

Glossary is where you create, edit, and delete glossary terms. A glossary entry consists of a term in a specific locale with one or more definitions. Each definition can have a source associated with it. Glossary terms also may have related terms, so a user can easily access terms that are similar or associated with each other. Related terms can be in the same or a different locale as the glossary term.

2.5.1 WORKFLOW FOR CREATING A GLOSSARY TERM

Any user assigned the content manager role can create a glossary within their domain. The workflow for creating a new glossary consists of the following:

1. *Edit Glossary Term*: The term, locale, and keywords for the glossary term are used as information that allows users to easily find the glossary term when they

perform searches.

2. *Edit Definitions*: This is where you add, edit and delete definitions for a glossary term. Every glossary term must have at least one definition. If there is only one definition for a term and you try to delete it, the system will not allow you to perform this action. You will need to create a new definition first, then delete the other one.

3. *Manage Related Terms*: This is where you search for and view terms that are already related to the glossary term that you are currently managing. You may add related terms that are not of the same locale as the term you are currently managing. In the Glossary, related terms appear under the definitions for the term, and the related terms are links to definitions of those terms.

4. *Assign Permissions*: This is where you search for roles, users, and organizations to assign a permission to view, launch, or manage a glossary term. Roles, organizations, and users already assigned a permission for the glossary term are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Permissions can be changed at any time.

5. *Edit Glossary Term Activity*: In order to make a glossary term active or inactive you must complete the Edit Activity workflow step. By default, after creating a new glossary term it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive glossary terms are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

6. *Share the Glossary Term*: This is where you indicate how your glossary term is shared. By default, when a glossary term is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.

7. *Check in the Glossary Term*: Select the Check In tab when you have completed setting up the glossary term so that users may access it, and the "Available" icon displays for the glossary term in the Editing Status column in search results.

2.5.2 CREATE A GLOSSARY TERM STEP-BY-STEP INSTRUCTIONS

1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Glossary.
4. Select "Create New" from the Page menu.

5. Click Go.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD NAME	DESCRIPTION
*Term	The glossary term.
*Locale	The geographic location for the term (the location in which the term is used).
*Keywords	Words and phrases that relate to the glossary term that are not already included in the term or definition. When choosing keywords, think of words that a user would type into the search field when trying to find the glossary term.

7. Click Next.

To add a definition:

8. Type a source for the definition in the Source field.
9. Type a definition for the glossary term in the Definition field.
10. Click Create if adding a definition for the first time or click Add Definition if adding more definitions. The source and the definition are displayed in the table at the bottom of the tab. Note: Click Back to return to the Edit Glossary Term tab.

To reorder definitions:

11. Select numbers from the menus in the Order column in the table at the bottom of the tab to indicate the order in which you want the definitions to be displayed. Each sequential number must be indicated only once or the reordering will not occur. Example: Next to the definition you want displayed first, select "1" from the menu in the Order column. Select "2" from the menu for the definition you want displayed second, etc.
12. Click Reorder. The definitions are displayed in the new order, and a message displays at the top indicating the changes were saved.

To add a related term:

13. Select Add Related Terms from the Page menu.
14. Click Go to access the Search page for adding related terms.
15. Click Add Related Terms. A message displays at the top of the page indicating the terms were added as related terms.
16. Click Return to go back to the Related Terms page or click another workflow step.

To add permissions for a role/organization/user:

17. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
18. Click the checkboxes to either place checkmarks in, or remove checkmarks

from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.
19. Click Save. A message displays at the top of the page indicating the permissions were updated.
20. Click Return to go back to the Search page for glossary term or click another workflow step.

To set an activity:
21. Select the Edit Activity tab.
22. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
23. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
24. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
25. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the glossary term with other domains:
26. Click the Content shared to other domains button. The checkboxes in the table are enabled.
27. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
28. Click Save.
29. Click Return to go back to the previous page.
30. Select the Check In tab when you have completed creating the glossary term so that users may access it, and the "Available" icon displays for the glossary term in the Editing Status column in search results.

2.6 SURVEYS

Authorized users create and publish surveys in the Administration area, and users take published surveys in the Reference Center.

When creating a survey, if you choose to make it a content survey, it will not be available in the Reference Center. It will only be available when an authorized user searches for surveys to associate with content (e.g., a classroom course or test).

2.6.1 WORKFLOW FOR CREATING A SURVEY

Any user assigned the content manager role can create a survey within their domain. The workflow for creating a new survey consists of the following:

1. *Edit Summary*: Summary information allows users to easily find the survey when they perform searches. This information includes the title of the survey, the description of the survey, keywords, and the survey type.

2. *Edit Structure*: This is where you create, edit, reorder, and delete survey sections contained in the survey. You have two options in the Page menu: Create New Section and Link Existing Section. Create New Section is where you enter summary information about a section (allows the section to be found when users perform a search for survey sections) in order to create the section. Link Existing Section allows you to search for existing survey sections and select the sections that you want placed in your survey. You may reorder sections using the menus in the Order column at any time prior to publishing the survey. After publishing a survey, the questions, sections and associated survey scales cannot be changed and published again. Also, you may not reorder or delete sections, and the Action menu for sections are disabled after the survey is published.

3. *Select Categories*: This is where you choose which category or categories contain this content. Categories are used to organize content within the system.

4. *Edit Window Attributes*: This is where you specify the window dimensions and other aspects of the window (e.g., presence of toolbars, ability to resize the window) in which the content displays.

5. *Assign Permissions*: This is where you search for roles, users, and organizations to assign a permission to view, launch, or manage a survey. Roles, organizations, and users already assigned a permission for the survey are displayed in a list at the bottom of the Edit Permissions tab. Existing permissions are also displayed in the list. Permissions can be changed at any time.

6. *Edit Survey Activity*: In order to make a survey active or inactive you must complete the Edit Activity workflow step. By default, after creating a new survey it is automatically active for an indefinite period of time. Therefore, you only access this workflow step if you want to change the values. Inactive survey are stored in the system and are only viewable or searchable by authorized users when specifically searching for it using the Advanced search.

7. *Share the Survey*: This is where you indicate how your survey is shared. By default, when a survey is created, it exists in the creating domain only. It is not shared or pushed unless you access the Content Sharing tab.

2.6.2 CREATE A SURVEY

To create a survey:
1. Click Administration.
2. Click the plus sign next to "Manage Content."
3. Click Surveys.
4. Select "Create New" from the Page menu.
5. Click Go.
6. Complete the form by entering data in the fields as explained below. *All required fields are marked with an * asterisk.*

FIELD	DESCRIPTION
*Title	The name of the survey.
*Description	An explanation of the survey.
*Keywords	Words and phrases that relate to the survey that may not already be included in the title or description. When choosing keywords, think of words that a user would type into the search field when trying to find the survey.
*Survey Type	Select whether the survey you are creating/editing is a content survey (can be linked to a course or content item) or a site survey (a standalone survey accessible in the Library).

7. Click Create.

To create a new section:
8. Type a title for the section in the Title field.
9. Type a description of the survey in the Description field.
10. Type keywords that users would most likely use when searching for this survey section.
11. Select a survey scale from the Scale menu. Click "View Selected Scale" to view the survey scale and confirm it is the scale you want to use.
12. Click Save. The Edit Structure tab displays with a message indicating the section was created. The survey section you created is displayed at the end of the list of section titles.

To link existing sections to your survey:
13. Type a keyword or phrase in the Search Text field to find a survey section.
14. Change the search type in the Search Type menu. (Optional)
15. Click Search to view a list of survey sections that match your search criteria.
16. The search results display alphanumerically and may include paging.
17. Click the checkbox next to the section you want to link to your survey. Multiple sections may be selected.
18. Click Select. The Edit Structure tab displays with a confirmation that the section

was linked to your survey, and the section displays at the bottom of the table.

To create new questions:

19. Select Create New Question from the Page menu.
20. Click Go. The New Question tab displays.
21. Type a question in the Question field.
22. Select a question type from the Type menu. Multiple choice means there will be several choices and the user picks one, and Short Answer means a text field is available for users to type their answer.
23. Click Create. The Manage Questions tab displays with a message indicating the question was created and added to your survey section.

To link existing questions:

24. Select Link Existing Questions from the Page menu.
25. Click Go. The Link Existing Questions tab displays.
26. Type a keyword or phrase in the Search Text field, change the search type in the Search Type menu and click Search.
27. Click the checkbox next to the question or questions you want to link to your survey section (see Link Existing Questions for details about this tab).
28. Click Select. The Manage Questions tab displays with the question(s) you added.

To select categories for the document:

29. Click the plus (+) sign to expand the tree and view the available categories.
30. Click the checkbox next to a category for the content. You may select multiple categories.
31. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the category was saved) or click Return to go back to the previous page.

To edit window attributes:

32. Select "Yes" for attributes that you want displayed in the window or select "No" for attributes you do not want displayed (see explanations below).
33. Change the width of the window in the Width field. This value must be in pixels.
34. Change the height of the window in the Height field. This value must be in pixels.
35. Click Preview to view what the window will look like based on your selections.
36. Continue changing the attributes and previewing them until you are satisfied.
37. Click Save if you are going to continue making changes using other workflow steps (message displays indicating the attributes were saved) or click Return to go back to the Search page.

To add permissions for a role/organization/user:

38. Search for users by name, role or organization to add to this permission. Enter search criteria in the fields and click Search.
39. Click the checkboxes to either place checkmarks in, or remove checkmarks

from, the checkboxes in the View/Launch/Manage columns next to the entity(ies) for which you want to change permissions. You may change permissions for multiple entities at the same time.

40. Click Save. A message displays at the top of the page indicating the permissions were updated.
41. Click Return to go back to the Search page for glossary term or click another workflow step.

To set an activity:

42. Select the Edit Activity tab.
43. Click the button next to "Inactive" or "Active." The "Active" button is selected by default.
44. Click the calendar icon to select a date or use the menus and the Year field to enter the Start Date. (Optional)
45. Click the calendar icon to select a date or use the menus and the Year field to enter the End Date. (Optional)
46. Click Save (message displays indicating the activity was saved). Click another workflow step to continue making changes or click Return to go back to the previous page.

To share the survey with other domains:

47. Click the Content shared to other domains button. The checkboxes in the table are enabled.
48. Click the appropriate checkboxes in the table to place checkmarks in them and indicate how the content will be shared. If the content is already shared and you want to unshare it, click the checkboxes to remove the checkmarks. Note: For each domain, only one option can be checked.
49. Click Save.
50. Click Return to go back to the previous page.
51. Select the Check In tab when you have completed creating the glossary term so that users may access it, and the "Available" icon displays for the glossary term in the Editing Status column in search results.