

Intermediate Customer Content Management – D2D Portal



Created by: Allie Pettigrew



Agenda

- Content Manager Roles
- What are Customers?
- D2D Portal Content Type Use Cases
 - Customer Teams
 - Data Models
 - Slideshows
- D2D Portal Best Practices
- Limitations to what you will be able to do on the D2D Portal.

Content Manager Roles

- Beginner Content Manager can create and edit:
 - 1.
 - 2.
 - 3.
 - 4.
- **Intermediate Content Manager can create and edit:**
 - 1.
 - 2.
 - 3.
 - 4.
- Advanced Content Managers can:
 - 1.
 - 2.

Content Type: Customer

- Customer – group of users who require access to the same Content.
 - Organization – a GSA business unit (PBS, OFM, Regions 1-11).
 - Community of Interest – inter-organization or inter-agency users who need to share access to common data (RPMT, Benchmarking, ACT).
- Customers own all Content.
- Users are members of Customers.
- If Content is Private (not visible to anyone with internet access), only Users who are members of the Customers who own the Content may see the Content.
- Each Customer is represented on the D2D Portal by a Customer Page.



Customer Page

- After you log into the D2D Staging Portal, use the Keyword Search function to find and navigate to your Customer's Page.
- From the Customer Page you can:
 - Add new Content:

CREATE CUSTOMER CONTENT

- [Add an Article](#)
- [Add a Dataset](#)
- [Add a Document](#)
- [Add a Report](#)

- Edit existing Content:



Use Case 1: Customer Team



Use Case 2: Data Model



Use Case 3: Slideshow



D2D Portal Best Practices

- When you are updating existing Content, make one change at a time.
- When you are updating existing Content, make a note in the “Revision log message” field after you have finalized your changes.
 - Note should include all the changes you made.
- Before you create new Content, do a keyword search for what you want to call it.
 - It is important that each piece of D2D Portal Content have a unique name.
- When creating new Content:
 - If it doesn't work, don't create a new piece of Content; try to figure out why it didn't work.
- Use Google Chrome to work in the D2D Portal.
- Compose all of your text in a word-processing software.
- Please send all requests/questions for me over email, not Google Hangouts.
- Read the manual! It contains step-by-step instructions on how to do everything we have discussed.

Limitations

- If I didn't tell you how to create it, edit it, or otherwise do it, you may not create it, edit it, or otherwise do it.
- If you have any questions regarding what you can do on the D2D Portal, please contact askd2d@gsa.gov.
- If you want to do something I did not tell you how to create, edit or otherwise do, please contact askd2d@gsa.gov.



Q & A

