Ops Portal 2.0  
a.k.a. ManagerWeb

Content Manager’s Guide

Last Update: June 10, 2016

|  |  |
| --- | --- |
| DashboardBranding In the *Branding* section, you can set the Title, Subtitle, and background image.  Use the **Save changes** button to save edits to the Title and Subtitle text.  *NOTE*  The Background image is changed on its own, and isn’t associated with the **Save changes** button. |  |

|  |  |
| --- | --- |
| DashboardOrder Featured Content In this section, you can drag/drop existing Features to change their display order.  The top-to-bottom order set in this section determines the left-to-right order on the site’s Dashboard.  When you reorder Features, the change takes effect immediately.  The section also has a short-cut to the **Feature Manager**, covered later in this document.  *NOTE*  You can see all available Features within the Dashboard Admin, but Features are only visible on the site’s Dashboard when the current date is between a Feature’s start/end date. |  |

|  |  |
| --- | --- |
| DashboardQuickLinks In this section, you can drag/drop existing QuickLinks to change their display order on the site’s Dashboard.  When you reorder QuickLinks, the change takes effect immediately.  You can also create new QuickLinks and Delete existing QuickLinks.  *NOTE*  Once created, QuickLinks cannot be edited; they can only be reordered or deleted. |  |

|  |  |
| --- | --- |
| DashboardCreating QuickLinks The *Name* of a QuickLink is the text that appears on the link displayed on the site.  There are three types of Quick Links:   * folder * document * external   Simply select the type you’re trying to create and a modal will appear.  For folder/document QuickLinks, browse the Library folder tree to find and select the folder/document you want.  For external QuickLinks, enter the URL of the site you want to link to. External Links will always open in a new tab/window when clicked. |  |

|  |  |
| --- | --- |
| DashboardNotification Preferences This setting lets you determine how document updates are displayed in the Notifications area of the Dashboard.   * **By Days** Show only the last x days’ worth of updates * **By Documents** Show only last x documents’ worth of updates |  |

|  |  |
| --- | --- |
| Featured ContentFeature Manager - Feature Listing Click on **Create New Feature** to create a new Feature.  Click on a Feature’s **Title** to edit an existing Feature.  Click on the **Delete** (trashcan) button to delete a Feature. |  |

|  |  |
| --- | --- |
| Featured ContentFeature Manager - New/Edit - Display Options **Title** sets the title on the actual Feature page.  **Tile Label** sets the label used on the homepage. Use this field if the feature name is particularly long.  **Start & End** sets when the tile is displayed on the homepage.  **Thumbnail** sets the image used for the tiel on the homepage.  **Background** sets the image used on the actual Feature page. |  |

|  |  |
| --- | --- |
| Featured ContentFeature Manager - New/Edit - Documents Documents listed here are displayed in the Featured Documents section of the Feature page.  Click **Add More Documents** to select documents to be displayed.  Documents can be removed by clicking on the Remove (trashcan) button for each listed document. This doesn’t delete the document; it only removes it from the Feature. |  |

|  |  |
| --- | --- |
| Featured ContentFeature Manager - New/Edit - Packages Packages listed here are displayed in the Additional Documents section of the Feature page.  Use **Add More Packages** to select existing Packages to display.  Use the **Remove** (trashcan) button to remove a Package. This doesn’t delete the Package; it only removes it from the Feature.  *NOTE*  Packages cannot be reordered within a Feature, so ensure you add them to the Feature in the order you would like them to be presented. |  |

|  |  |
| --- | --- |
| Featured ContentFeature Manager - New/Edit - Notifications & Saving The **Latest Updates** setting determines for how long (*By Days*) or how many (*By Documents*) document updates are displayed in the Notifications section on the Features page.  All updates to a Feature need to be saved using the **Save changes** button. Once saved, changes are live on the store-facing Feature page. |  |

|  |  |
| --- | --- |
| Featured ContentManage Packages - Package Listing Packages let you group documents and folders differently than they’re organized in the Library.  Click on **Add New Package** to create a new Package.  Click on a package’s **Title** to edit an existing Package.  Click on the **Delete** (trashcan) button to delete a Package. |  |

|  |  |
| --- | --- |
| Featured ContentManage Packages - New/Edit The **Name** of a Package is what’s displayed for the Content Manager in the Package Listing.  The **Label** of a Package is what’s displayed on a Feature page.  Click **Add More Files** to include documents from Library in the “top-level” of a Package.  Click **Add More Folders** to select folders (and their documents/subfolders).  Folders/Files can be removed from a Package by clicking on the **Remove** (trashcan) button. this doesn’t delete the file/folder; it only removes it from the Package.  Don’t forget to save using the **Save changes** button. |  |

|  |  |
| --- | --- |
| CalendarManage Events Edit Events by clicking on their *Titles* in the Event List.  Delete Events by clicking on the **Delete** (trashcan) button.  Add a new Event by clicking on the **Add New Event** button. |  |

|  |  |
| --- | --- |
| CalendarAdd/Edit Event Events have the following fields:   * **Title** The text displayed on the event in the Workload Calendar on the site. * **Event Type** Currently has no effect on the site Calendar display-wise. * **Start & End** Dates * **Description** * **Stores** All stores will see this event in their Calendar by default, but you can instead select which specific stores should see the event. |  |
| CalendarManage Event Types You can edit an Event Type’s name by clicking on its name in the listing.  You can delete an Event Type by clicking the **Delete** (trashcan) button.  You can add a new event type by clicking on the **Add New Event Type** button.  *NOTE*  Event Types currently aren’t visible/filterable for site users. Event types are distinguished only by their names at this time. |  |

|  |  |
| --- | --- |
| CommunicationsManage Communications You can edit a particular Communication by clicking on the **Edit** (pencil) button.  You can delete a Communication by clicking on the **Delete** (trashcan) button.  You can create a new Communication by clicking on the **New Communication** button. |  |

|  |  |
| --- | --- |
| CommunicationsAdd/Edit Communication Events have the following fields:   * **Title** The text displayed on the event in the Workload Calendar on the site. * **Start & End** Dates * **Type** Allows for Communication filtering on the site. * **Body** The content of your Communication. * **Attachments** Selected from the Library. * **Target Stores** All stores will see this Communication by default, but you can instead select which specific stores should see the event. |  |

|  |  |
| --- | --- |
| CommunicationsManage Communication Types Create a new communication by clicking on the **Add New Communication Type** button.  Delete Communication Types by clicking on the **Delete** (trashcan) button.  *NOTE*  Communication Types can’t be edited at this time, only created or deleted. |  |

|  |  |
| --- | --- |
| LibraryFile/Folder Browsing Select/Expand/Collapse folders on the left.  Selected folders’ contents appear on the right.  With a selected folder, you can:   * Add files * Add a subfolder * Edit the folder name * Delete the folder   With documents within a folder, you can:   * view/download the document by clicking on its title * edit the document’s attributes (e.g. title) by clicking on the **Edit** (pencil) button * delete a document by clicking on the **Delete** button   *NOTE*  Files can’t be added to the root (banner) folder. The root folder can’t be renamed or deleted. |  |

|  |  |
| --- | --- |
| LibraryAdding Files - Upload Step You can preset which stores should see the documents to be uploaded as well as the start/end date.  Files can be dragged onto to page or selected via a standard file upload dialog (Add files…).  Clicking Remove will remove a file from the list of files selected for upload.  Once files have been selected for upload and you’re happy with the store/date settings, click Start Upload.  Once the upload is complete, click on the Review Documents button that appears. |  |

|  |  |
| --- | --- |
| LibraryAdding Files - Review Step Titles (visible to site users) are intelligently determined based on the original file name, but can still be edited in this step.  The Start and End dates for individual documents can also be edited here.  Clicking **Done** will return you to the Library. |  |

|  |  |
| --- | --- |
| LibraryManaging Documents - Folder Listing Documents listed in any given folder within the Library can be viewed/downloaded by clicking on their Title.  Documents can be deleted by clicking on the Delete button (trashcan) or edited by clicking on the Edit button (pencil). |  |
| Editing Documents *Editing the Alert status of a document is covered under Alerts & Notices below.*  You can change the Title, Start/End dates and Target stores of a document.  NOTE: You cannot overwrite (re-upload) a document; a new, separate upload is required if a new version of an existing document is needed. |  |

|  |  |
| --- | --- |
| Alerts & NoticesManage Alerts - Alerts Listing Alerts are Library documents that have been tagged as Alerts. They’ll show up in the Alerts area of the store-facing site in addition to the Library, making them more visible.  Click on an Alert’s **Title** to view/download it.  An Alert is ‘Visible’ if the current date/time is between the Start/End date/time set for the Alert.  Click the **Edit** (pencil) button to make changes to an Alert.  Click the **Cancel** button to remove the Alert status from an Alert. This doesn’t delete the document.  You can quickly see which stores can see an Alert by clicking on the listing’s **Stores** button, which already displays how many stores will see the Alert. |  |

|  |  |
| --- | --- |
| Alerts & NoticesManage Alerts - Edit Document Any document can become an Alert simply by checking the **This document is an alert** checkbox when editing a document and choosing an Alert type. |  |

|  |  |
| --- | --- |
| Alerts & NoticesManage Urgent Notices - Urgent Notice List Click **Add New Urgent Notice** to create a new notice.  Click on an Urgent Notice’s **Title** to edit it.  Click on the **Delete** button to delete it. |  |

|  |  |
| --- | --- |
| Alerts & NoticesManage Urgent Notices - Edit Urgent Notice Urgent Notices are edited using the same editor as Communications, except that:   * Urgent Notices don’t have a Type field * You can link folders (as well as documents) to an Urgent Notice   Urgent Notices are only visible to store users if:   * their store is one of the Target Stores set for the Urgent Notice * the current date/time is between the Start & End date/time set for the Urgent Notice |  |