

OGC ANALYTICS PORTAL
New Features Instructions for: Contacts, Documents, & Custom Menus

7/20/2020

[INSTRUCTIONAL VIDEOS](#)

SECTION 1: Contacts

[WATCH VIDEO](#)

1. Adding new contacts:

Page Content ⚙️ ⬆️

Main Additional page settings

Custom title

Custom menu

Content

Click the "Add section" button below to start creating your layout

Agenda
Columns
Contacts
Documents
Main content (default WP field)
Portfolio
Portfolio company
Reports
Shortcode
Text section

Add section

2. Editing existing contacts:

2

Contacts

Title *

EUROPE

Content *

Name

Sören Stamer

Info *

Add Media

VisualText

ParagraphBBIListListQuoteListListListLinkListImageTable

CEO
Email: soeren.stamer@coremedia.com
Mobile: +49 (40) 325-587-100

P

1

2

Name

Klemens Kleiminger

Add block

3. How it shows:

The screenshot illustrates the relationship between a content management system (CMS) interface and the resulting web page layout. The CMS interface on the left features a 'Content' panel with the following structure:

- Text section**: A dropdown menu.
- Contacts**: A section header.
- Title ***: A text field containing 'EUROPE'.
- Content ***: A section containing:
 - Name**: A text field containing 'Sören Stamer'.
 - Info ***: A section with an 'Add Media' button and a rich text editor.
 - CEO**: A text field containing 'Email: soren.stamer@soeramedia.com'.
 - Mobile**: A text field containing '+49 (40) 325-587-100'.

The preview area on the right shows the rendered 'Contact' page. Green arrows indicate the mapping from the CMS fields to the page content:

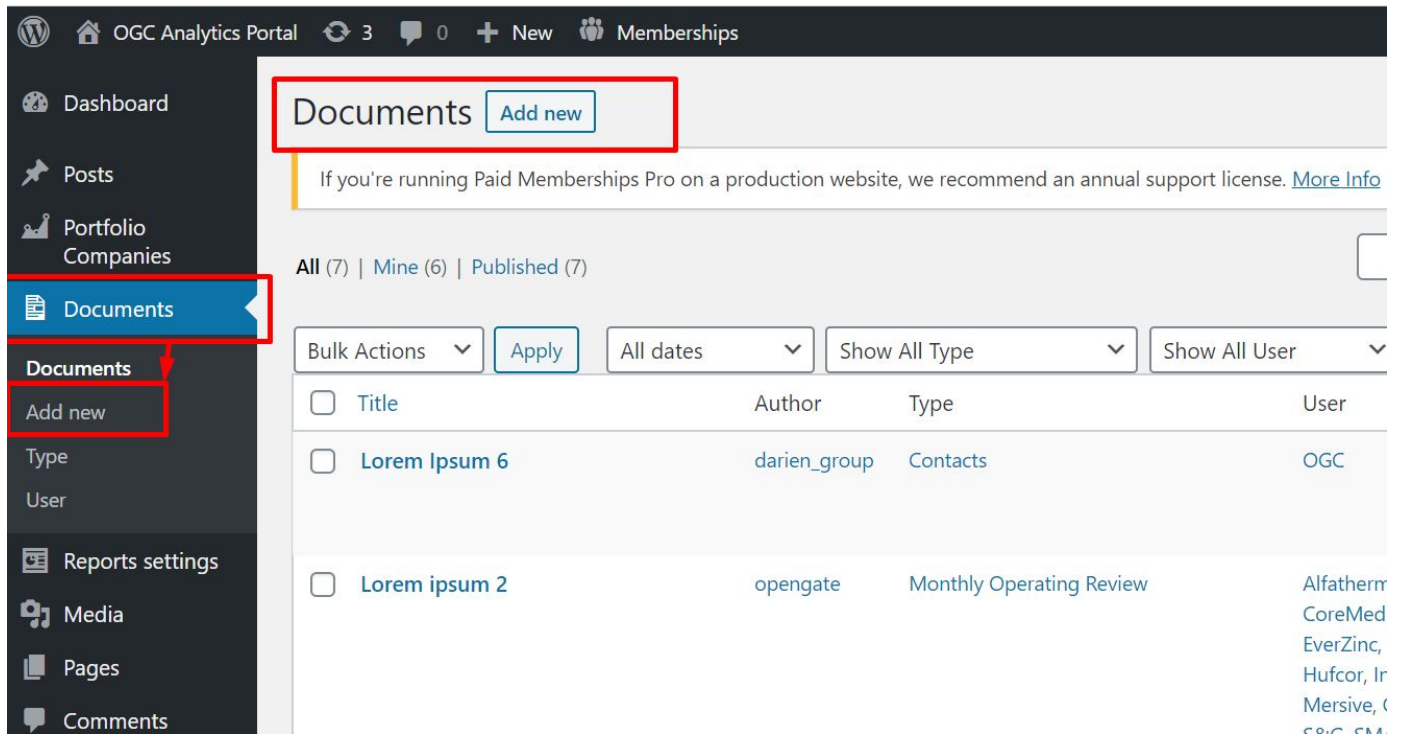
- The **Text section** dropdown maps to the 'Contact' title.
- The **Title *** field maps to the 'Address: Ludwig-Erhard-Str. 18, 20459 Hamburg, Germany' and 'ZIP: 20459' text.
- The **Name** field maps to the 'EUROPE' header.
- The **Info *** section maps to the contact details for 'Sören Stamer' and 'Klemens Kleiminger'.
- The **CEO** field maps to the 'Email: soren.stamer@soeramedia.com' text.
- The **Mobile** field maps to the 'Mobile: +49 (40) 325-587-100' text.

The footer of the page displays the 'OGC ANALYTICS PORTAL' logo and the tagline 'DATA. INSIGHT. ACTION.'.

SECTION 2: Documents

[WATCH VIDEO](#)

1. Adding new documents:



The screenshot shows the OGC Analytics Portal interface. The top navigation bar includes a home icon, 'OGC Analytics Portal', a refresh icon with '3', a chat icon with '0', a '+ New' button, and a 'Memberships' icon. The left sidebar contains a list of menu items: Dashboard, Posts, Portfolio Companies, Documents (highlighted with a red box), Documents (sub-menu, highlighted with a red box), Add new (sub-menu, highlighted with a red box), Type, User, Reports settings, Media, Pages, and Comments. The main content area is titled 'Documents' with an 'Add new' button (highlighted with a red box). Below the title is a message: 'If you're running Paid Memberships Pro on a production website, we recommend an annual support license. [More Info](#)'. The main content area also features filters: 'All (7) | Mine (6) | Published (7)'. Below the filters are four dropdown menus: 'Bulk Actions' (with an 'Apply' button), 'All dates', 'Show All Type', and 'Show All User'. The main content area displays a table of documents with columns: Title, Author, Type, and User. The table contains two rows of data: 'Lorem Ipsum 6' by 'darien_group' of type 'Contacts' and 'OGC', and 'Lorem ipsum 2' by 'opengate' of type 'Monthly Operating Review' and 'Alfatherr CoreMed EverZinc, Hufcor, Ir Mersive, (C) 2018 CMAA'.

<input type="checkbox"/>	Title	Author	Type	User
<input type="checkbox"/>	Lorem Ipsum 6	darien_group	Contacts	OGC
<input type="checkbox"/>	Lorem ipsum 2	opengate	Monthly Operating Review	Alfatherr CoreMed EverZinc, Hufcor, Ir Mersive, (C) 2018 CMAA

OGC Analytics Portal

30

New

Memberships

Howdy, darien_group

Screen Options

Dashboard

Posts

Portfolio Companies

Documents

Documents

Add new

Type

User

Reports settings

Media

Pages

Comments

Power BI

wpDiscuz

Memberships

Appearance

Plugins 3

Users

Tools

Settings

Custom Fields

Common fields

WP Mail SMTP

miniOrange OAuth

SuperPWA

Collapse menu

Add new document

If you're running Paid Memberships Pro on a production website, we recommend an annual support license. [More Info](#) | [Dismiss](#)

New Document

Permalink: https://opengateanalytics.com/?post_type=ogc-pa-documents&p=4883&preview=true

Document

File *

Placeholder7

File name: Placeholder7.zip

File size: 2 MB

Author

darien_group (darien_group)

Publish

Save Draft

Preview

Status: **Draft** [Edit](#)

Visibility: **Public** [Edit](#)

Publish immediately

07-Jul 20, 2020 at 09:17

OK Cancel

[Duplicate This](#)

[Move to Trash](#)

Publish

Type

Type Most Used

☐ Contacts

☒ Monthly Operating Review

[+ Add New Category](#)

User

User Most Used

☐ Inrule

☐ Jøtul

☐ Mersive

☒ OGC

☒ Power Partners

☐ Ravelli

☒ S&G

☐ SMAC

[+ Add New Category](#)

WordPress dashboard header: OGC Analytics Portal, 3 notifications, 0 comments, + New, Memberships. User: Howdy, darien_group.

Left sidebar menu: Dashboard, Posts, Portfolio Companies, Documents (selected), Documents (sub-menu), Add new, Type, User, Reports settings, Media.

Documents

[Add new](#)

If you're running Paid Memberships Pro on a production website, we recommend an annual support license. [More Info](#) | [Dismiss](#)

Filters: All (8) | Mine (7) | Published (8) | Search document | 8 items

Controls: Bulk Actions | Apply | All dates | Show All Type | Show All User | Filter

<input type="checkbox"/>	Title	Author	Type	User	Date
<input type="checkbox"/>	New Document	darien_group	Monthly Operating Review	OGC, Power Partners, S&G	Published 18 seconds ago
Edit Quick Edit Trash View Duplicate This					
<input type="checkbox"/>	Lorem ipsum 6	darien_group	Contacts	OGC	Published 2020/07/17

2. Adding documents section:

Page Content settings: Main | Additional page settings

Custom title:

Custom menu:

Content: Click the "Add section" button below to start creating your layout

Right sidebar: Replace Image, Remove feature, Discussion (Allow comments), Page Attributes (Parent Page: (no parent), Order), Require Membership

Section selection dropdown (highlighted "Documents"):

- Agenda
- Columns
- Contacts
- Documents**
- Main content (default WP field)
- Portfolio
- Portfolio company
- Reports
- Shortcode
- Text section

[Add section](#)

URL: os://openqateanalytics.com/wp-admin/post.php?post=1760&action=...

Page Content

Main

Additional page settings

Custom title

Custom menu

Content

1 Documents

Show columns

Date	Upload by	File type	Size
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Show all documents

☐

Show documents for: *

☐ Hufcor

☐ Infinity Tapes

☐ Inrule

☐ Jøtul

☐ Mersive

☒ OGC

☐ Power Partners

☐ Ravelli

☐ S&C

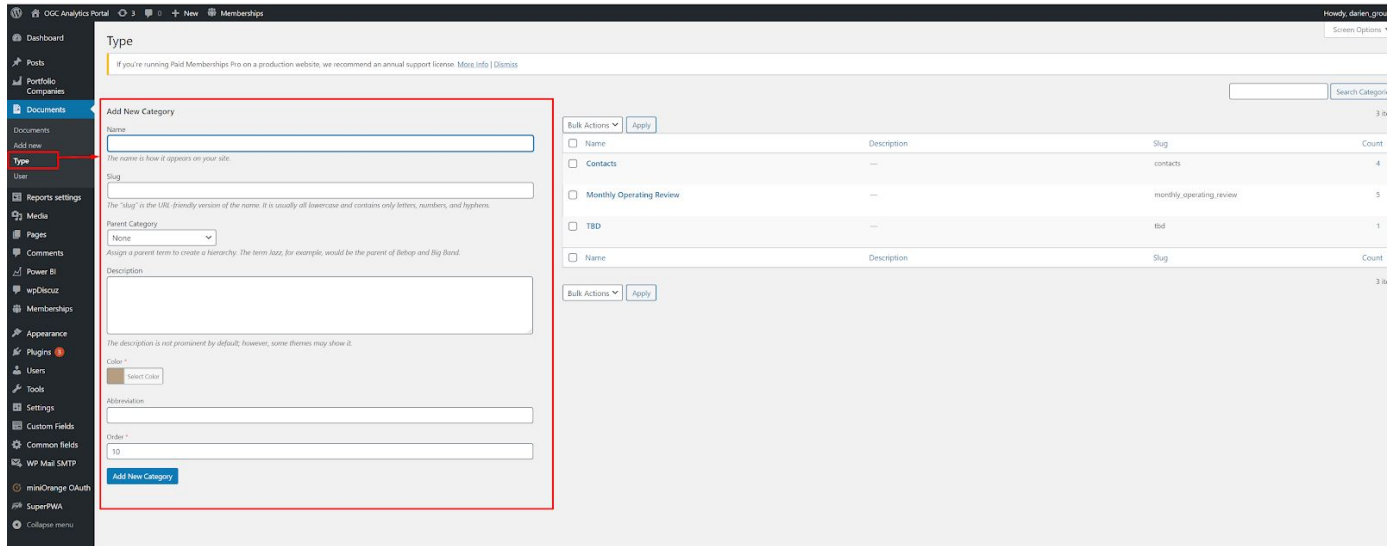
Show filters

☒

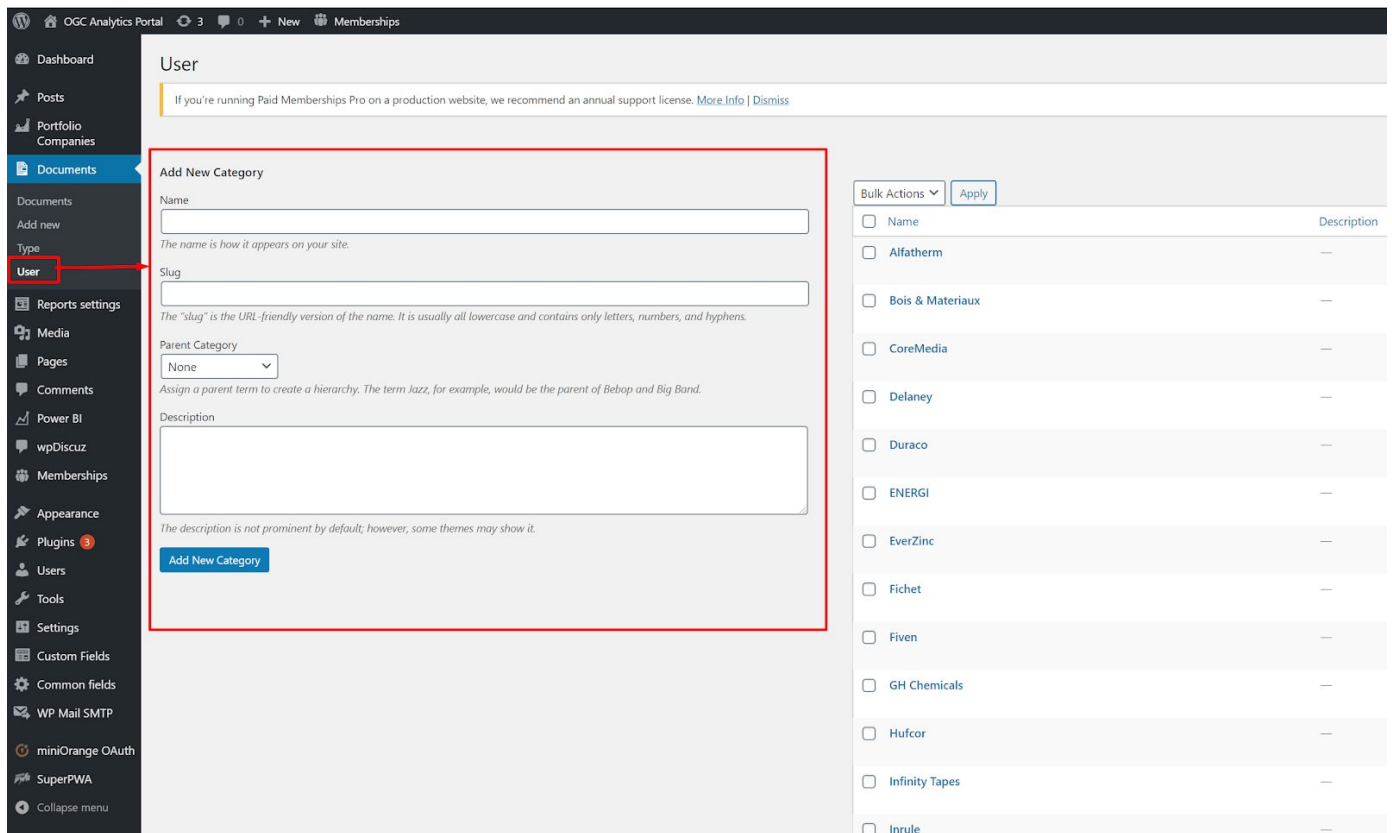
Enable custom styles

3. Creating a new Documents type:

[WATCH VIDEO](#)

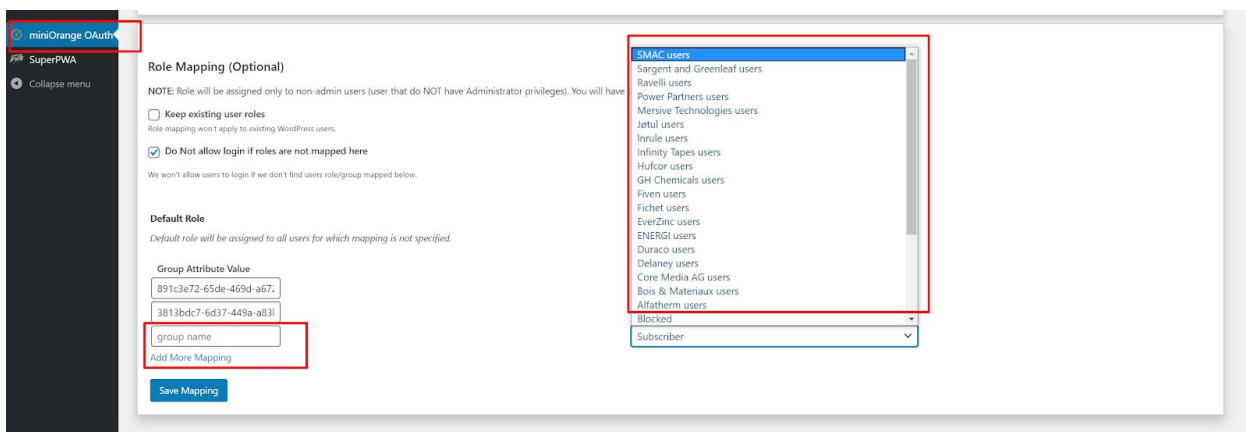
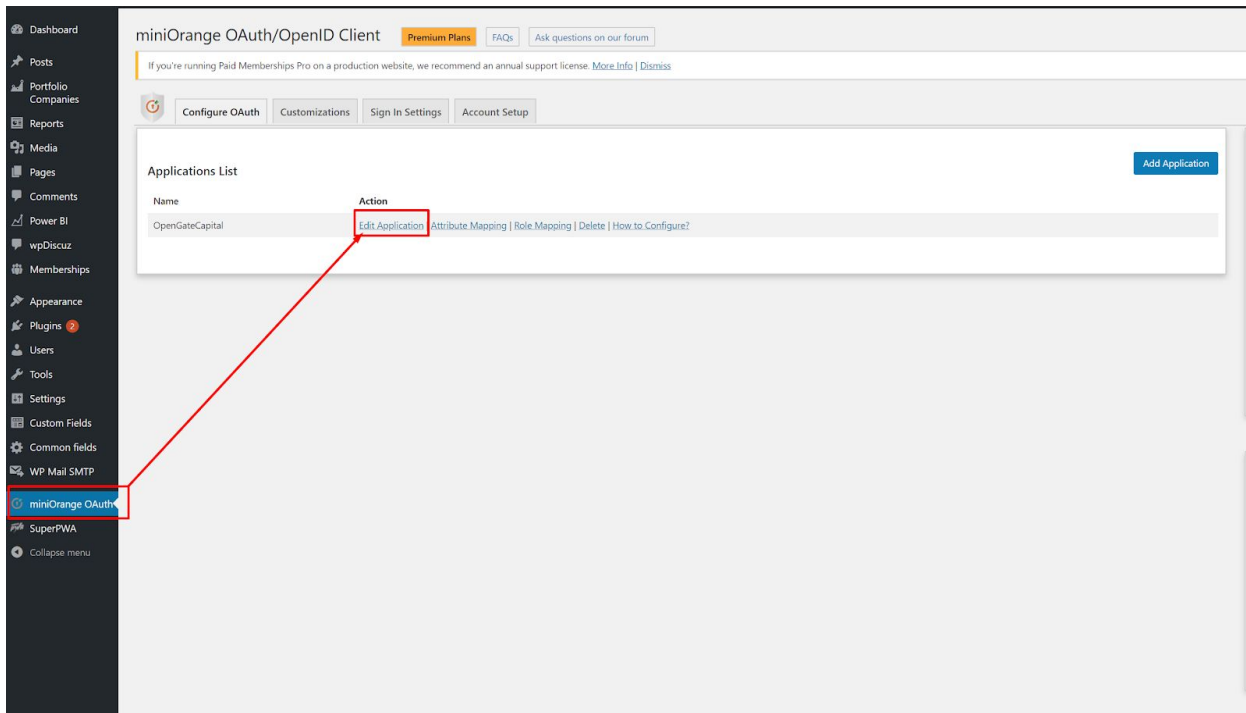


4. New Documents user:

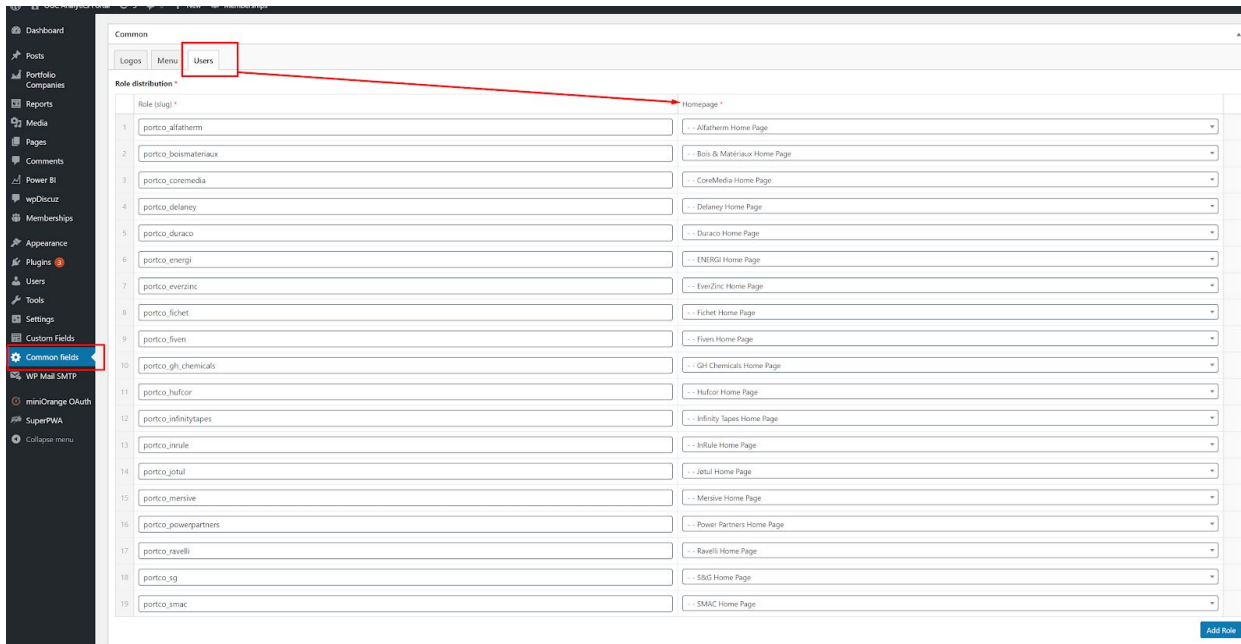


SECTION 3: Custom Menus

1. It is necessary to associate PowerBI user groups with user groups in WP through the corresponding miniOrange OAuth plugin menu (task for the PowerBI OGC administrator):

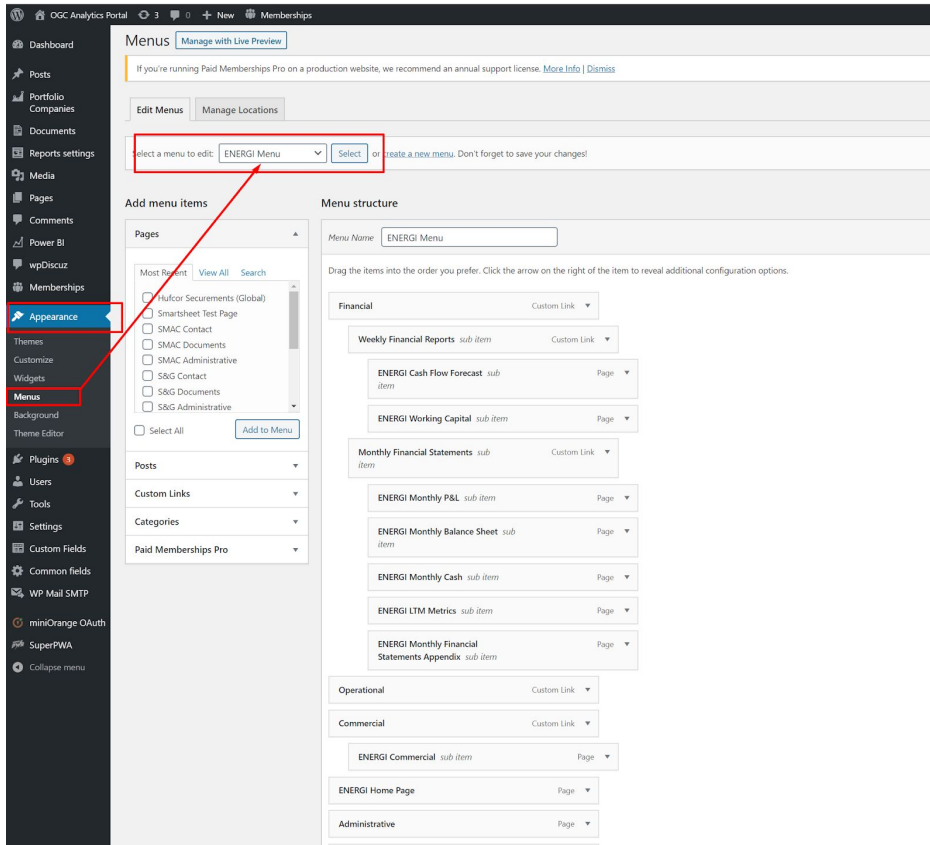


2. We have distributed user roles according to company homepages:



3. Adding custom menus.

Step 1 - Creation (note: we have already created 19 menus for established in OGC AP portfolio companies):



Menu custom fields

Enable custom fields



Main color *



Hover color *



For users with a role: *

- ☐ Alfatherm users
- ☐ Bois & Materiaux users
- ☐ Core Media AG users
- ☐ Delaney users
- ☐ Duraco users
- ☒ ENERGI users
- ☐ EverZinc users
- ☐ Fichet users
- ☐ Fiven users
- ☐ GH Chemicals users
- ☐ Hufcor users
- ☐ Infinity Tapes users
- ☐ Inrule users
- ☐ Jøtul users
- ☐ Mersive Technologies users
- ☐ Power Partners users
- ☐ Ravelli users
- ☐ Sargent and Greenleaf users
- ☐ SMAC users

Step 2. Adding a menu to all pages on which this menu should be displayed:

Page Content

Main Additional page settings

Custom title

Custom menu

ENERGI Menu

Content

1 Shortcode

Step 3. On the next tab, you can turn off the display of breadcrumbs (note: We have implemented a condition in the code under which the display of breadcrumbs for portfolio companies (user role slug starts with "portco_") is disabled. Also for these users, the "Back to Analytics Portal" button in top menu is hidden, and there is no opportunity to visit any pages, except for those on which the name of their custom menu will be entered):

Page Content

Main Additional page settings

Page badge

Select

Redirect to

Select link

Hide breadcrumbs

☒