

FileNET Guide for AHC PageMasters



AcademicHealthCenter

UNIVERSITY OF MINNESOTA

PageMasters have the permissions necessary to perform the following tasks with Site Tools:

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PageMasters who have completed the “Image Optimization for the Web” training provided by AHC may also:
Add new images and other assets (New Asset)

Application Requirements

1. Windows operating system
2. Internet Explorer 5.5 or 6.0 or Netscape 6.1
3. Pop-up blockers must be disabled for filenet.software.umn.edu in order for the Workflow process to work properly.
4. Valid x.500 (University of Minnesota internet) id and password that is set up in FileNET.
NOTE: authentication will time out after 60 minutes of inactivity, so ensure all work is saved.

Access FileNET

1. Launch your Web browser (Internet Explorer 6.0)
2. In your browser address field, enter this URL:

<https://filenet.software.umn.edu>: _____
(provided by AHC FileNET Support)

Notice the https in the address. Bookmark this address for easy access in the future.

Log in to FileNET

1. Scroll to the bottom of any of your pages and see the Login link.
2. Click the Login link and enter your Internet ID and Password.
3. Click continue, close, or minimize the Login Window.



You have successfully logged in to FileNET when you see the Site Tools menu floating on top of the Web page. Site Tools gives you the commands you need.

Navigate the Site

You can navigate to all the other linked pages in the site using navigation or breadcrumbs. Note that if you reach a page without Site Tools, you have navigated to a page for which you do not have edit permissions.

Add and Edit Text to Existing Pages

1. Navigate to the page to be edited
2. Click Content Editor on the Site Tools menu

The Page Editor Wizard is launched. The Layout tab is active by default. If only content will be changed (i.e., no changes to navigation name, url, date of last update, etc.), skip to number five (5) below.



3. Click on the Information tab to change the name, title, description, parent, and/or layout of this page.
 - Name is the default for the current portion of the URL that the user will need to get directly to this page.

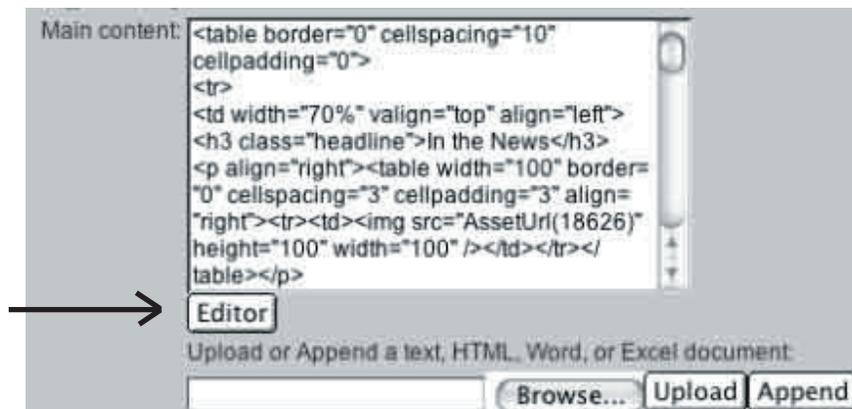
The value should be short, one word, no capitalization, no spaces, no underscores or other special characters.

- Title is the navigation name and the name of the Web page bookmark. It is also incorporated into the META title of the page (used by external search engines).
- Description is incorporated into the META description of the page (used by external search engines).
- Parent is the page under which the current page belongs.
- Layout is the chosen layout for the content of the current page. The Browse button lets you see a list of other possible layouts. Note that most pages are added using the AHC_Unformatted layout, which gives the user the ability to format the content using the Visual Editor tool. For formats that are used frequently, it is beneficial to have a unique layout developed. Contact AHC-IS (bjs@umn.edu) for more information.

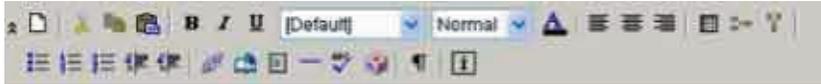
4. Click on the Attributes tab to change the template, URL, priority, navigation visibility, publication date, expiration date, category, and/or access area of this page.
 - Template – most PageMasters will have three templates available to them – one that contains the design elements for the site’s home page, one that contains the design elements for the site’s interior pages, and one that contains global header and footer information but is without design. The last layout is useful for content that is displayed very wide and doesn’t need to have design elements surrounding it.
 - URL – initially the URL is built by using the path to get to the parent page and adding the value from the Name field on the Information tab. This can be changed. It is not recommended to change the path up to the current level, but the current level can be changed here. If you make a change to the Name field on the Information tab, the URL page is NOT automatically updated.

ADVANCED TIP: FileNet builds the URL such that the user visiting your site will have to type in “.html” to see the page (e.g., www.ahc.umn.edu/aboutus.html). If you wish to get around this, you can add “/home” to the end of the URL field. This makes the URL something like www.ahc.umn.edu/aboutus/home.html. Since “home.html” is a default page on our Web servers, the user doesn’t have to type this in, so they can access the page by simply typing www.ahc.umn.edu/aboutus.

- Priority – use the priority field to determine the order in which your navigation is displayed. By default, all pages contain a priority of 20. FileNET sorts your navigation first by priority, then alphabetically, therefore every page with the same priority will be sorted alphabetically. To change this, simply change the priority for the pages.
 - Show – unchecking this box will hide the page from dynamically generated navigation. This is useful if you do not wish an item to appear in navigation, but instead want to build a link to the page in the body of the content or in a special area on the homepage.
 - Publication Date – initially the publication date is set as the date the page is created. This value appears at the bottom of each page in the footer as the “Last Modified on” date. Change this value if you wish the “Last Modified on” date to be current or to display something other than the FileNET page creation date.
 - Expiration Date – if you wish the page to come down on a certain date, use the expiration date check box and date field.
 - Category – if you have an area of your site that is being dynamically generated based on categories, this is where you make the page assignment. For more information or to set up a category area on your site, contact AHC-IS (bjs@umn.edu).
 - Access Area – your access area is selected by default. If you have permissions for more than one access area, you may choose another or multiple access areas. Setting the access area governs who has permission to edit the current page.
5. Click on the Layout tab to change the content of the page.
- The fields available on this page differ depending on which layout was chosen on the Attributes tab.
 - Most layouts contain one or more multi-line content boxes with an Editor button directly under the box. The content box will display the content in HTML mode. Click on the Editor button. The existing content for the page is presented in a new window in visual format (Visual Editor).



You are presented with a text formatting toolbar:



Top

Row: New, Cut, Copy, Paste, Bold, Italic, Underline, Font, Size, Font Color, Alignment, Insert Table

Bottom Row: Bulleted list, Numeric bullets, Alpha bullets, Indent, Outdent, Insert Link, Bookmark, Horizontal Rule (line), Spell Check, Insert Symbol, Show All, About

Use of tools:

We caution against the use of italic, underline, font, size, and font color. We encourage you to let the site's cascading style be applied to your font (Verdana 11pt for normal text) in order to provide consistency and maximum readability to your users. Studies have shown that it is more difficult to read text with serif font, italics, and colored text online. The use of underline is discouraged as it frequently confuses the user into thinking it is a hyperlink.

Note that what you see in the Visual Editor is not exactly what will appear to your users. For instance, your browser will display the text in the default font for your browser (usually Times), not the font that will be displayed via our cascading style sheet (Verdana). Also, since the Visual Editor does not display the site design from the templates, the content will be devoid of design mastheads.

Formatting tips:

- To create a blank line between paragraphs, press Enter.
- To create a line break without a blank line, press Shift + Enter.
- Use the Insert Symbol icon to enter special characters. For a trademark symbol, bold the >. (Click to select the symbol, click the Insert button, click the Close button).
- To make a bulleted list, first create a paragraph break between the heading and all the list items. To force an item outside the bulleted list, click the Increase Indent button.
- To alter a table once it's been added to the page, right-click inside the table for a contextual menu.
- DO NOT use the Undo button to undo the last format change. Undo will undo all the formatting since the last submit.

ADVANCED TIP: We use special code to present colored text for headlines, using the color that matches your site. By using this special code, we can easily change a color code in one place and change the color of the headlines throughout your site. To display text in a headline fashion (Verdana 14pt bold) in the color of your site, wrap the text in the following tags:

```
<font class="headline">text here</font>
```

Note that cannot be done in the Visual Editor. For a smaller headline (Verdana 11pt bold) use:

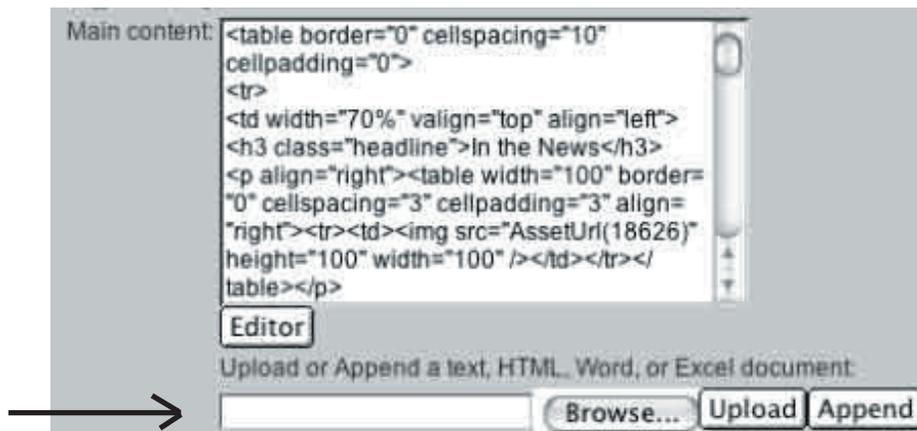
```
<font class="bodysubtitle">text here</font>
```

- Click Save to save your changes and exit the Visual Editor.

6. On the Layout tab, choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
7. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in “View Assigned Tasks” below to gain access to the page. Click on Submit.
8. FileNET submits the changes, generates the page, and provides a link “Click to view the page.” Click the link to see the changes. Close the original window so only the updated window is open.
9. When you generate pages, they are published within FileNET and not for public view. At this point, the WorkFlow process that has been developed for your site will kick in and the page will be sent on for additional processing.
10. Note that if the parent page of the current page contains dynamically generated sub-navigation, the parent page will need to be regenerated before you will be able to see any changes to the page Name.

ADVANCED TIP:

You can also add content by uploading a Word, Excel, text, or HTML file. To do this, use the Browse button found under the Editor button.



Once you have browsed and found the file on your hard drive and the filename and location appear in the text box, click the Upload (existing content will be replaced with the uploaded file) or Append (attached file will be added to the existing content) button. FileNET converts the files into HTML code for the content box.

Note that in most cases you will not be able to then use the Visual Editor to maintain content on the new page.

If you have content in Word that you would like to bring into FileNET, we recommend opening the page in Word, copying the text, and pasting it into the Visual Editor box. Format the text using the Visual Editor and follow the steps above to save the content.

Add or Replace a Graphic Image

Before you can insert a graphic into a FileNET page, the image must be uploaded to the FileNET database. If you have not attended special training for image optimization, contact your FileNET support person to have the image uploaded.

Once the image has been uploaded, you may add a graphic to a page as long as the Layout includes an Image object. The AHC_Lay_One_Image, AHC_Lay_Two_Image, and AHC_Lay_Whats_Inside layouts provide this ability.

1. Click Content Editor to see the Page Editor Wizard.
2. Next to the Insert Image click the Browse button.
3. Navigate to either the AHC General images folder or the image folder for your site. Note that you can navigate to the image folder for other sites, but you will not be able to see the images unless you've been provided access.
4. Click on the appropriate image. The image will open in the preview window.
5. Click OK and the filename will be inserted into the insert image field.
6. Use the align and horizontal/vertical spacing options under the image field to place the image in the proper location. Note that the first image field on the AHC_Lay_Whats_Inside layout will always be placed directly under the sub-navigation on the right-hand side.
7. Choose the radio button that says "Generate all languages/formats" and click on the Submit button in the lower right corner.
8. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose "Completed" from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in "View Assigned Tasks" below to gain access to the page. Click on Submit.

ADVANCED TIP: If you are comfortable working with HTML code, you may add an image anywhere on your page by adding the following code to the proper location in your code:

```

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Where "xyz" is the Asset ID or the Asset Name of the image in FileNET. Your FileNET support person can provide the ID to you. You can find the Asset Name by going to the Content Editor of a page that is currently using a Layout with an image object. Click the Browse button next to the image object and navigate to the image you wish to use. Copy the image name into your clipboard, and paste in the parentheses after the AssetUrl keyword.

The "AssetUrl" keyword is case sensitive, so enter exactly as shown. Note that all parameters are valid, including align, vspace, hspace, alt, etc.

Add Links

Create a Local Link

A local link is a URL for a different page located WITHIN THE SAME DESIGN. Each FileNET page has an ID number that displays on the bottom of each page, just below the Login button. To make a local link, reference this number.

Note that the AHC_Lay_Whats_Inside and AHC_Lay_Page_Listing layouts are designed to dynamically display sub-navigation for a page. If these layouts are used, creating a link is unnecessary, unless a redundant link is going to be placed into the body of the text.

1. Using the Visual Editor, highlight the text that you want to be the link.
2. Click the Insert Hyperlink button.
3. In the HREF field, erase “http://” and enter “PageUrl(XXXXX)” where “XXXXX” is the Page ID. Do not enter any spaces. The PageUrl keyword is case sensitive, so enter exactly as shown.
4. For the link to direct the user’s browser to open the page in a new window, click on the Target popup box and select New Window. Note that we discourage this practice because it is impossible for users of screen readers (sight-impaired users) to use the back button on the browser to return to the page of origin.
5. Click OK and Save.
6. Choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
7. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in “View Assigned Tasks” below to gain access to the page. Click on Submit.

Create an EMAIL Link

1. Using the Visual Editor, highlight the text that you want to be an email link.
2. Click the Insert Hyperlink button.
3. In the HREF field, erase “http://” and enter “mailto:xyz@umn.edu” where “xyz@umn.edu” is the email address. Do not enter any spaces.
4. Click OK and Save.
5. Choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
6. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in “View Assigned Tasks” below to gain access to the page. Click on Submit

ADVANCED TIP: To create a cc: or bcc: for the email link, or to also prefill the subject line of the email, expand the mailto: link as follows:

```
mailto:xyz@umn.edu?cc=abc@umn.edu&bcc=def@umn.edu&subject=Web Feedback
```

Note that a “?” character must separate the initial email address and the second mailto parameter, and each additional parameter must be separated with a “&” character.

Create an External Link

An external link is a URL for a page located on a different site.

1. Using the Visual Editor, highlight the text that you want to be the link.
2. Click the Insert Hyperlink button.
3. In the HREF field, enter the URL (e.g., <http://www.umn.edu>). Ensure the file protocol (i.e., <http://>) is present.
4. For the link to direct the user’s browser to open the page in a new window, click on the Target popup box and select New Window. Note that we discourage this practice because it is impossible for users of screen readers (sight-impaired users) to use the back button on the browser to return to the page of origin.
5. Click OK and Save.
6. Choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
7. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in “View Assigned Tasks” below to gain access to the page. Click on Submit.

Create a Link to a Downloadable File

Before you can link to a downloadable file (e.g., a PDF document) in FileNET, the document must be uploaded to the FileNET database. If you have not attended special training for image optimization, you will not have the ability to add new assets. In this case, contact your FileNET support person to have the file uploaded. Ask your support person to provide an Asset ID for the document.

1. Using the Visual Editor, highlight the text that you want to be the link.
2. Click the Insert Hyperlink button.
3. In the HREF field, erase “<http://>” and enter “[AssetUrl\(XXXXX\)](#)” where “XXXXX” is the Asset ID. Do not enter any spaces. The AssetUrl keyword is case sensitive, so enter exactly as shown.
4. For the link to direct the user’s browser to open the page in a new window, click on the Target popup box and select New Window. Note that we discourage this practice because it is impossible for users of screen readers (sight-impaired users) to use the back button on the browser to return to the page of origin.
5. Click OK and Save.

6. Choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
7. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in “View Assigned Tasks” below to gain access to the page. Click on Submit.

Create a Named Anchor

A named anchor lets you link to a specific place within a page. The advantage is the user does not have to scroll to reach specific information.

1. Using the Visual Editor, put your cursor where you want to insert the named anchor.
2. Click the Insert Bookmark button.
3. Enter the Bookmark name. Do not use spaces or special characters.
4. Highlight the text that you want to be the link.
5. Click the Insert Hyperlink button.
6. In the HREF field, erase “http://” and enter “#bookmarkname” where “bookmarkname is the value you inserted in step 3 above.
7. Click OK and Save.
8. Choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
9. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in “View Assigned Tasks” below to gain access to the page. Click on Submit.

ADVANCED TIP: For very long documents, also create links farther down the page that say something like “Return to top”. The value in the HREF field should simply be “#”.

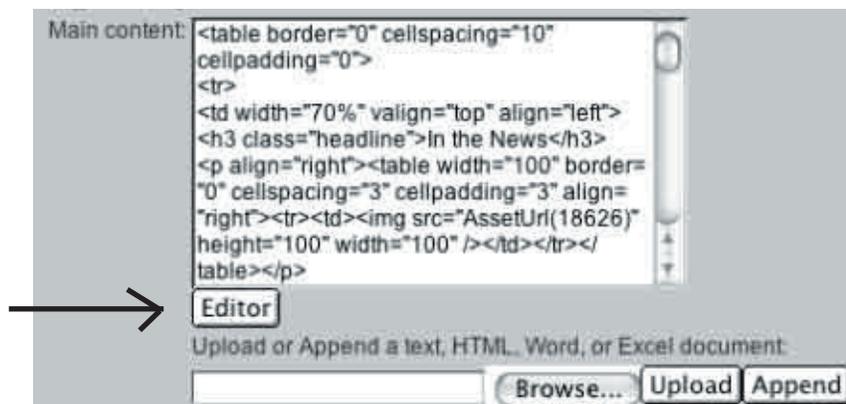
Add a New Page

1. Using the Site Tools, choose New Page.
2. The Page Editor Wizard is launched.
3. Use the Information tab to set the name, title, description, parent, and/or layout of this page.
 - Name is the default for the current portion of the URL that the user will need to get directly to this page. The value should be short, one word, no capitalization, no spaces, no underscores or other special characters.
 - Title is the navigation name and the name of the Web page bookmark. It is also incorporated into the META title of the page (used by external search engines).
 - Description is incorporated into the META description of the page (used by external search engines).
 - Parent is the page under which the current page belongs. Use the Browse button to navigate to the parent level. Once selected, click OK and the value will be filled into the Parent box. Note that if you do not see an “OK” button, you do not have permission to add a page to that access area.
 - Layout is the chosen layout for the content of the current page. The Browse button lets you see a list of possible layouts. Most pages are added using the AHC_Unformatted layout, which gives the user the ability to format content using the Visual Editor. For formats that are used frequently, it is beneficial to develop a unique layout. Contact AHC-IS (bjs@umn.edu) for more information.
4. Click on the Next button. Use the Attributes tab to set the template, URL, priority, navigation visibility, publication date, expiration date, category, and/or access area of this page.
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 - URL – initially the URL is built by using the path to get to the parent page and adding the value from the Name field on the Information tab. This can be changed. It is not recommended to change the path up to the current level, but the current level can be changed here. If you make a change to the Name field on the Information tab, the URL page is NOT automatically updated.

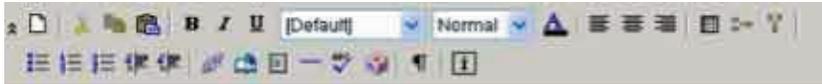
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 - Most layouts contain one or more multi-line content boxes with an Editor button directly under the box. The content box initially be blank. Click on the Editor button. The existing content for the page is presented in a new window in visual format (**Visual Editor**).



You are presented with a text formatting toolbar:



Top Row: New, Cut, Copy, Paste, Bold, Italic, Underline, Font, Size, Font Color, Alignment, Insert Table

Bottom Row: Bulleted list, Numeric bullets, Alpha bullets, Indent, Outdent, Insert Link, Bookmark, Horizontal Rule (line), Spell Check, Insert Symbol, Show All, About

Use of tools:

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- Use the Insert Symbol icon to enter special characters. For a trademark symbol, bold the >. (Click to select the symbol, click the Insert button, click the Close button).
- To make a bulleted list, first create a paragraph break between the heading and all the list items. To force an item outside the bulleted list, click the Increase Indent button.
- To alter a table once it's been added to the page, right-click inside the table for a contextual menu.
- DO NOT use the Undo button to undo the last format change. Undo will undo all the formatting since the last submit.

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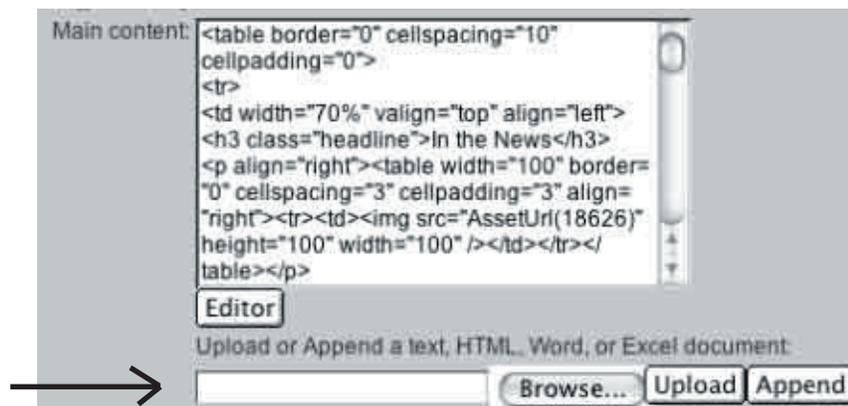
```
<font class="bodysubtitle">text here</font>
```

- Click Save to save your changes and exit the Visual Editor.

6. On the Layout tab, choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
7. FileNET submits the new page, generates the page, and provides a link “Click to view the page.” Click the link to see the changes. Close the original window so only the updated window is open.
8. Upon submission, the Workflow that applies to this page kicks in and you will see a screen asking for the task status. If your changes are complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To complete the content, follow the steps outlined in “View Assigned Tasks” below to gain access to the page. Click on Submit.
9. When you generate pages, they are published within FileNET and not for public view. At this point, the WorkFlow process that has been developed for your site will kick in and the page will be sent on for additional processing.
10. Note that if the parent page of the current page contains dynamically generated sub-navigation, the parent page will need to be regenerated before you will be able to see any changes to the page Name.

ADVANCED TIP:

You can also add content by uploading a Word, Excel, text, or HTML file. To do this, use the Browse button found under the Editor button.



Once you have browsed and found the file on your hard drive and the filename and location appear in the text box, click the Upload (existing content will be replaced with the uploaded file) or Append (attached file will be added to the existing content) button. FileNET performs a conversion and puts the HTML code into the content box.

Note that in most cases you will not be able to then use the Visual Editor to maintain content on the new page.

If you have content in Word that you would like to bring into FileNET, we recommend opening the page in Word, copying the text, and pasting it into the Visual Editor box. Format the text using the Visual Editor and follow the steps above to save the content.

Add a Page to the Intranet

PageMasters must have a special Access Area and Template set up to work with Intranet pages. Please contact your support person if you are uncertain if you have a special Access Area and Template.

Follow the steps outlined above to add a page, with the following exceptions:

1. The “entry point” or top level page into the intranet content must have a name/URL that is unique. All intranet for the AHC content goes to the same server and this will ensure content isn’t written over.
Example: “sphresearch” versus “research”
2. The “entry point” or top level page must also have the Show checkbox **UNCHECKED**.
3. The Access Area must **ONLY** be the special Access Area established for intranet content for this particular site.
4. Once the pages are created and deployed via the WorkFlow, create an **EXTERNAL** link to the “entry point” page from the public pages using the following URL:
<https://intranet.ahc.umn.edu/whatever>
where “whatever” is the value that appears in the URL box on the Attributes field.
5. It is not necessary to generate the page in both languages/formats.

Remove a Page

A page can be removed from a site by changing the Parent to a “to be deleted” folder, as follows:

- While viewing the page to be removed, click on the Content Editor tool in the Site Tools.
- Click on the Information tab.
- Next to the Parent field, click on the Browse button.
- Scroll through the list to find an element called “to be deleted” and select this element.
- Click on the Layout tab, choose “Generate All Languages/Formats” and submit.

IMPORTANT: any pages that contained a link to this newly removed page will need to be regenerated for the link to be removed.

View Assigned Tasks

1. From the Site Tools menu, click on Inbox.
2. A list of tasks assigned to you will be presented.
3. Click on a task and choose Open to work with the Workflow Assignee Wizard.
4. Review the task information on Page 1. Click the Next button.
5. The remaining pages vary depending on what type of task you are assigned. For instance, if you are acting as Copy Editor, you will get a Copy Editing Form with an Edit button that leads you into the Content Editor and a Preview Form that allows you to preview any changes you made).
6. The last page is the Task Completion Wizard. If your task is complete, choose “Completed” from the drop down menu. Any comments you provide will be sent to the next person in the Workflow process, if one exists. If the task is not complete, choose one of the other values. To come back and complete the task, follow the steps outlined above. Click on Submit.

Generate a Page

Generating a page puts all the elements of a page together to produce an HTML file on the FileNET server.

A page is automatically generated each time you submit changes by clicking the Submit button in the Content Editor/Page Editor Wizard. This is the recommended method of re-generating a page, since it also pushes the page into WorkFlow, which will in turn deploy the page to the live server.

To generate and redeploy a page:

1. Open the page using the Content Editor.
2. Make any changes
3. Choose the radio button that says “Generate all languages/formats” and click on the Submit button in the lower right corner.
4. The appropriate Workflow Process will kick in to lead the page to deployment.

To generate a page WITHOUT having the page enter workflow, utilize the “Generate” item on the Site Tools menu. Once the generation is complete, use the “refresh” button on the browser to refresh the page. Generating a page in this manner does not affect the page on the actual Web site.