

# PortalProdigy Document Collections Guide

Created on May 23, 2010

Last Updated June 1, 2010

## **What are Document Collections and How to Use them:**

Document Collections allow the insertion of components into HTML document pages the same way that components are inserted into the main content section of your Home Page. For those of you that are not familiar with components, components are objects (aka “gadgets” or “widgets”) that can be inserted into a page. We also use the term Mini Browser to refer to components. An example of a component is a News Mini Browser which lists your five most current news articles as hyperlinks to view each article.

Have a standard blurb that you want inserted at the bottom of multiple web pages? Use the Document Collections feature to automatically insert it into all applicable documents. Need to change the blurb? Change it in once place and it will automatically be updated in all documents.

At the present time the following components can be inserted into documents (we will be adding more in the future):

- Custom Mini Browser – create custom Mini Browsers and insert them into documents. E.g. you can use a Custom Mini Browser to insert a Flash or You-Tube Video in one or more documents.
- Document Mini Browser – insert another document into a document. This is great for inserting standard blurbs, footers, etc.
- Products Mini Browser – find the product catalog limiting? Now you can provide and format product information as documents and insert tables with automatically updated product information included pricing. Include add to cart, request quote, and place a bid options. This is great way to advertise a group of products where the information on the page applies to all products in the group. You can define your own product groups with no limit on the number of groups or the number of products in each group.
- Comparable Products Mini Browser – insert tables comparing your products to competitors’ products. Offers same options as Products Mini Browsers.
- Request Mini Browser - now you can add an input form to a document page. E.g. include a form for users to request additional information. Use Request Type Management to create custom forms.
- Slide Show Mini Browser – this is a new Mini Browser that will display a collection of pictures as a slide show. It has the option to display each picture’s file name without the file name extension below each slide as the slide is displayed.

Document Collections allow you can insert multiple Mini Browser components into a single document, including multiples of the same type. Document Collections can be re-used in other documents.

### **How to Create and Use Document Collections:**

Prerequisite: If you are going to insert Product Mini Browsers, Comparable Product Mini Browsers, or Request Mini Browsers into a Documents Collection, the first step is to prepare the Mini Browser components using the applicable management tool. Custom Mini Browsers and Document Mini Browsers can be created during the process described below.

#### **Steps:**

- 1) Create and save the HTML document you want to add a collection to. If you don't know how to do this, see the Chapter of the Administration Manual titled "Document Resource Library Feature in Detail".
- 2) With the document open in Document Manager the next step is to click the Page Manager option. This will open the Document Page Manager page.
- 3) In Document Pager Manger click View Styles for Feature Content Style. This will open the Feature Content Style Selection page.
- 4) In Feature Content Style Selection click Select for the Document Page style named "**Document Page**" (usually the first one listed). This will return you to Document Page Manager.
- 5) In Document Page Manager check Override checkboxes for both Feature Content Collection and Main Content Collection. Click the Save button.
- 6) Next click the Add New button for the Main Content Collection. This will open the Main Content Collection Manager page.
- 7) In the Main Content Collection Manager, first enter a name then create a component collection. If you don't know how to use Collection Manager, see the manual titled "Collection Manger" at <http://www.portalprodigy.com/main.asp?uri=1003&di=622>
- 8) When finished creating your collection, click Save then click Close. This will return you to Document Page Manager. Click Close in Document Page Manger and if prompted to save, click Save. This will return you to Document Management. The document is ready for use. To view the document click on the Document URL located in the Document Details section or click on the View button located at the bottom of the page.
- 9) The collection of components is automatically appended to the end of the document.

### **How to Prepare Mini Browser Components for Use in Document Collections:**

Custom Mini Browsers allow you to create your own custom components using HTML. They may include Java Script, Style Sheets (CSS), images, videos, and any other resource supported by HTML. Custom Mini Browsers are added and edited using option buttons located in Collection Manager.

Steps:

- 1) Open Collection Manager
- 2) Highlight “Custom” in Available Components.
- 3) Click the Add button located underneath the Available Style column. This will open Style Manager.
- 4) Your Custom Mini Browser is created as a style by pasting your code in the HTML field. You may also use the built-in HTML editor or upload your HTML file using the Append HTML file option. See the chapter of the Administrative Guide titled “Style Manager” for detailed instructions.

You can enable any HTML document to be used as a component in another document by assigning it to the “Document Component” Document Category.

Steps:

- 1) Open the document in Document Management.
- 2) Go to Document Categories section.
- 3) In the tree structure expand the “System Files” node and check “Document Component”.
- 4) Save the page. It will now be listed in Document Collection Manager as a choice Record Set for the Document component.

The latest version of the Collection Manager manual is available here:

<http://www.portalprodigy.com/main.asp?uri=1003&di=622>